HR351
Cardinal Employee Data Setup and Maintenance

Instructor Led Training

Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website (www.cardinalproject.virginia.gov) under **Learning**

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalog is located on the Cardinal website under Resources.

This course and all other Cardinal HCM training courses are available on the Cardinal Training Management System.

The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.

Introductions

Class Participant Introductions

- Please then share with the class the following information:
  - Name
  - Agency
  - Role
  - What is your favorite restaurant?

Course Objectives

After completing this course, you will be able to:

- Explain how the Cardinal HCM functional areas work together
- Add, clone, and maintain a position
- Hire an employee online (Personal and Job Data)
- Enter job data updates (Transfer, Leave, Separation)
- Enter additional pay information
- Review the mass upload options

Course Objectives

After completing this course, you will be able to:

- Enter and maintain Disciplinary Actions
- Enter and maintain Performance Ratings
- Enter and maintain Rewards and Recognition
- Access the HCM Reports Catalog
- Run a Report
- Run a Query

Agenda

1. Overview of Cardinal HCM
2. Key HCM Concepts
3. Setup and Maintain Employee HR Data
4. Maintain Employee Pay
5. Maintain Additional HR Data
6. Running Reports and Queries

Lesson

1 Overview of Cardinal HCM

This lesson covers the following topics:

- Cardinal HCM data supports the administration of:
  - Human Resource (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)

Cardinal HCM Human Resources

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. The business processes and sub-processes that make up the core HR functionality enable agencies to add and update:

- Position data (e.g., job code, department, location)
- Employee personal data (e.g., name, address)
- Employee job data (e.g., salary, hourly rate, pay group)

HR data maintained in the Human Resources functional area feeds into and supports all of the other HCM functional areas.

Cardinal HCM allows for the interfacing of HR data (e.g., personal, position, employee job data) from agency systems to Cardinal HCM.

The personal data record for an employee working in multiple agencies is shared by the applicable agencies.

Cardinal HCM Human Resources (continued)

The following HR business processes and sub-processes are part of Cardinal HCM:

- Set Up and Maintain Employee HR Data
  - Create and Maintain Position
  - Hire/Rehire Employee
  - Maintain Employee Data
  - Transfer Employee
  - Enter and Maintain Leave Status
  - Separate Employee
  - Mass HR Data Maintenance
  - Update Employee Compensation

- Administer Salary Plans
  - Administer Salary Plans

- Maintain Additional HR Data
  - Enter and Maintain Disciplinary Actions
  - Enter and Maintain Performance Ratings
  - Enter and Maintain Rewards and Recognition

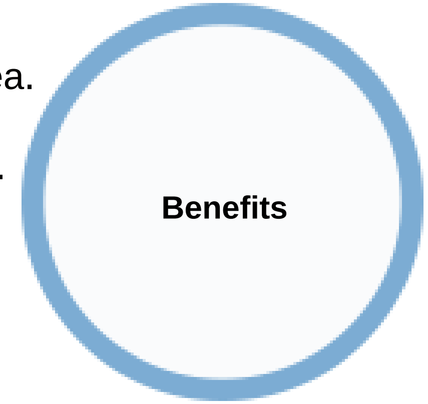
All of this data is utilized by other functional areas in Cardinal HCM and Cardinal Financials.

Cardinal HCM Benefits

The Benefits Administration (BN) functional area includes all of the processes required to maintain health benefits for the employees of the organization and their dependents. Benefits data maintained in the Benefits functional area feeds into the Payroll functional area.

The Employee Job records from HR are required for employees covered by health benefits.

COBRA letter processing, as well as COBRA enrollment, are administered centrally by the Office of Health Benefits (OHB) triggered by data entered on the Employee Job Record.

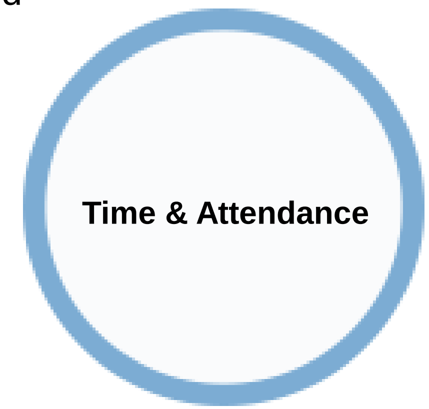


The following BN business processes and sub-processes are part of Cardinal HCM:

- Administer Event Maintenance
  - Maintain Enrollments
    - System Generated
    - Forms Life Events
    - Qualified Medical Support Court Orders (QMSCO)
    - Retirement
    - Deferred Compensation
    - Annuity
- Administer Open Enrollment
  - Administer Open Enrollment
- Administer COBRA
- Benefits Reconciliation
  - Healthcare Reconciliation
  - VRS Retirement Reconciliation
- ACA Reporting

Cardinal HCM Time and Attendance

The Time & Attendance (TA) functional area contains two modules: Time and Labor (TL) and Absence Management (AM). TA handles time and leave entry, as well as provides leave balances. The Time and Attendance functional area is used to record productive and non-productive time which drives pay for employees. Time entered feeds into the Payroll functional area.



Employee Job records from HR are required for employees who use TA to track time worked and leave.

The following TA business process and sub-processes are part of Cardinal HCM:

- TA Employee Setup
  - Enroll and Maintain Time Reporters and Comp Plan Enrollment
  - Create and Maintain Schedules

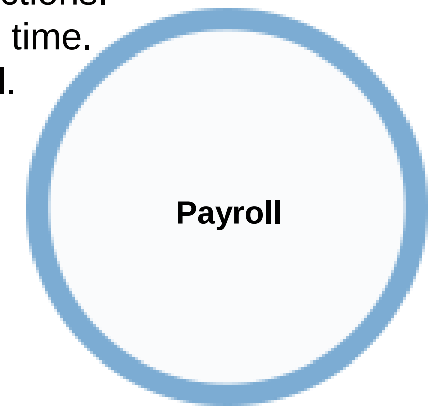
- TA Capture
  - Manage Time Entry
  - Manage Absence Reporting

- TA Approval and Processing
  - Administer Time and Processing
  - Administer Absence Processing
  - Administer Delegation

- Payroll Integration and Cost Allocation
  - Integration between Cardinal Time and Attendance and Payroll
  - Cost Allocation of Time after Payroll

Cardinal HCM Payroll

Payroll (PY) is the functional area that enables the calculation of earnings, taxes, and deductions. The Payroll functional area is used to ensure that all employees are paid accurately and on time. Employee Job records from HR are required for employees who will be paid out of Cardinal.

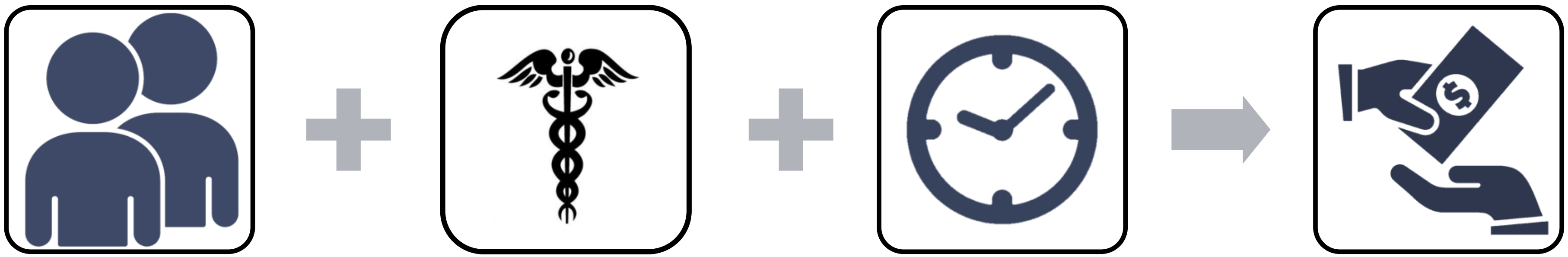


The following PY business processes and sub-processes are part of Cardinal HCM:

- Maintain Employee Payroll Data
  - Additional Pay
  - Employee Deductions
  - Employee Direct Deposits
  - Employee Taxes
- Using Single-Use Payroll Online Tool
  - Enter Payroll Adjustments
  - Approve Transactions
- Process Payroll
  - Create Paysheets
  - Calculate Pay
  - Confirm Payroll
- Off-cycle Processing
- Post Payroll
  - Process Pay Period Tax Payments
  - Process Pay Period Non-Tax Payments
- Payroll Costing
  - General Ledger Integration
  - Accounts Payable Integration
- Periodic Regulatory Reporting
  - Audit and Adjust Employee Balances
  - Prepare and File Regulatory Reports
  - Calendar Year End

Cardinal HCM Modules

The functional areas work together to generate an employee’s paycheck.



Human Resources (HR)

- Position
- Personal
- Job

Benefits (BN)

- Medical
- Life Insurance
- Retirement
- FSA
- TPA (TIAA, FBMC, ICMA-RC)

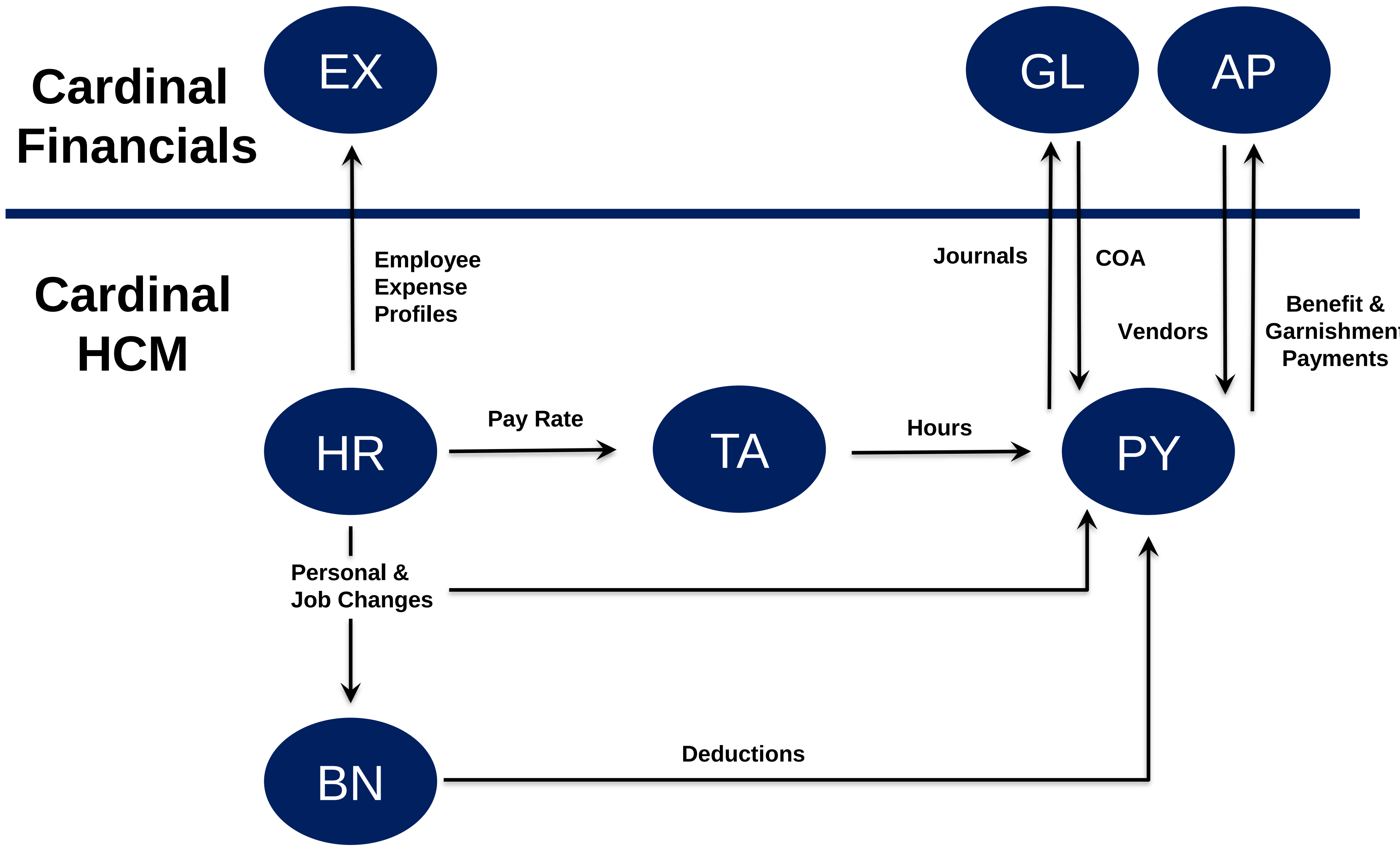
Time & Attendance (TA)

- Time
- Absences
- Approval

Payroll (PY)

- Earnings
- Deductions
- Taxes
- Review Paychecks

Cardinal HCM Interfacing to Cardinal Financials



Financials: Expenses (EX), General Ledger (GL), Accounts Payable (AP)

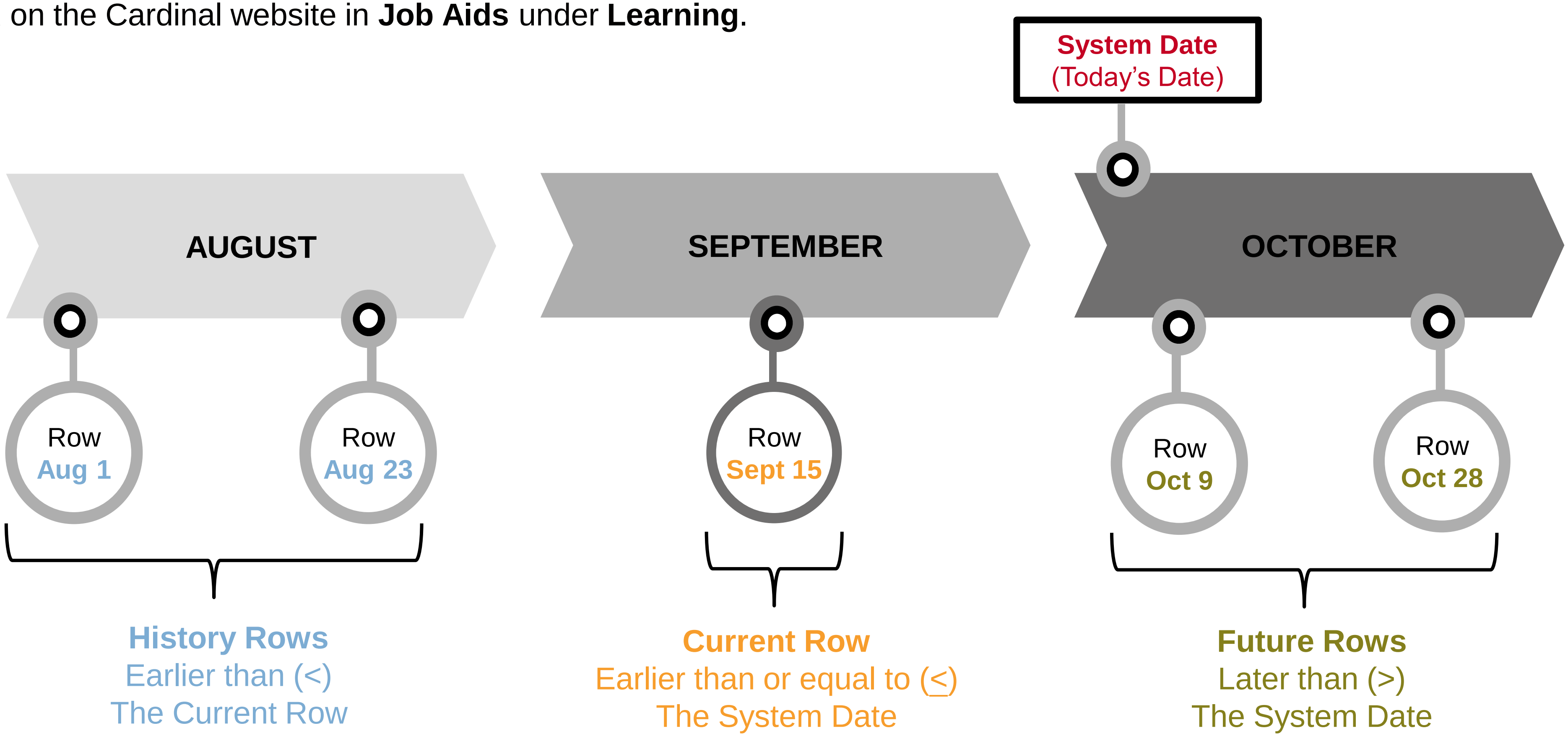
HCM: Human Resources (HR), Benefits Administration (BN), Time & Attendance (TA), Payroll (PY)

Cardinal Effective Dating

When entering new information related to existing data, such as a leave of absence, retaining the data already in the database is imperative. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

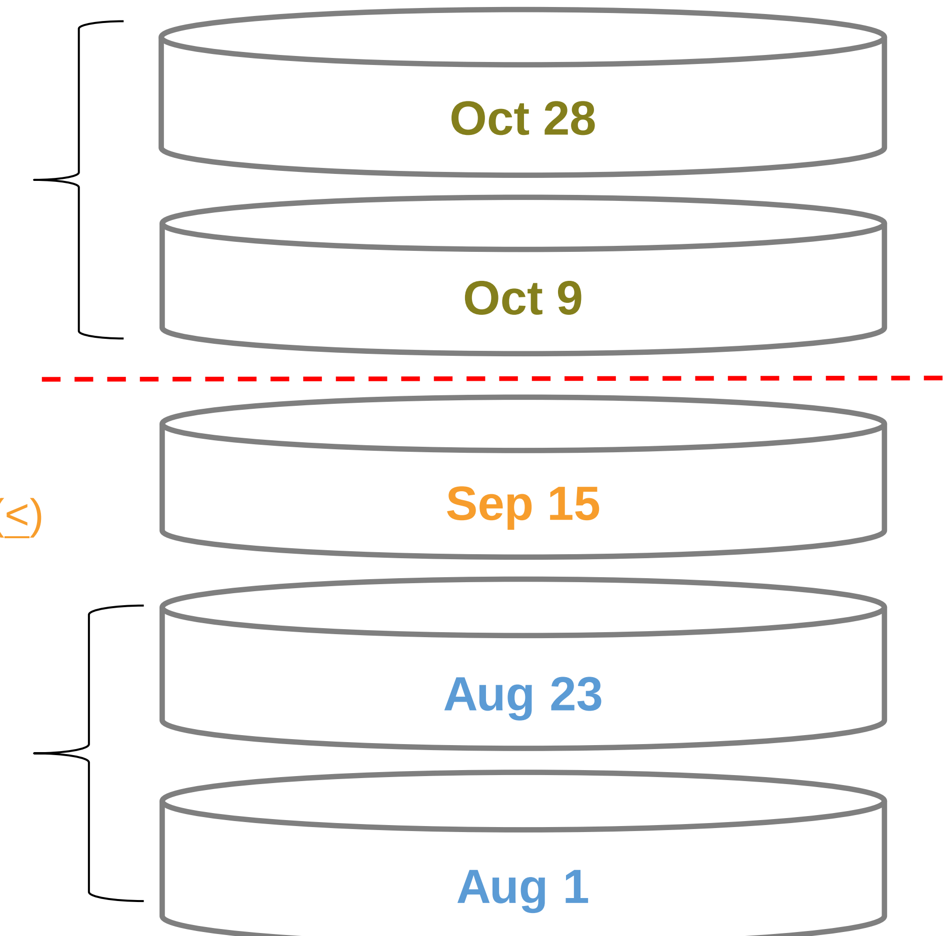
Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Cardinal Effective Dating Layer Cake

Future Rows
Later than (>)
The System Date



Rows waiting to be processed by Cardinal

System Date
Today's Date Oct 1

Current Row
Earlier than or equal to (≤)
The System Date

Row Cardinal is currently using for processing

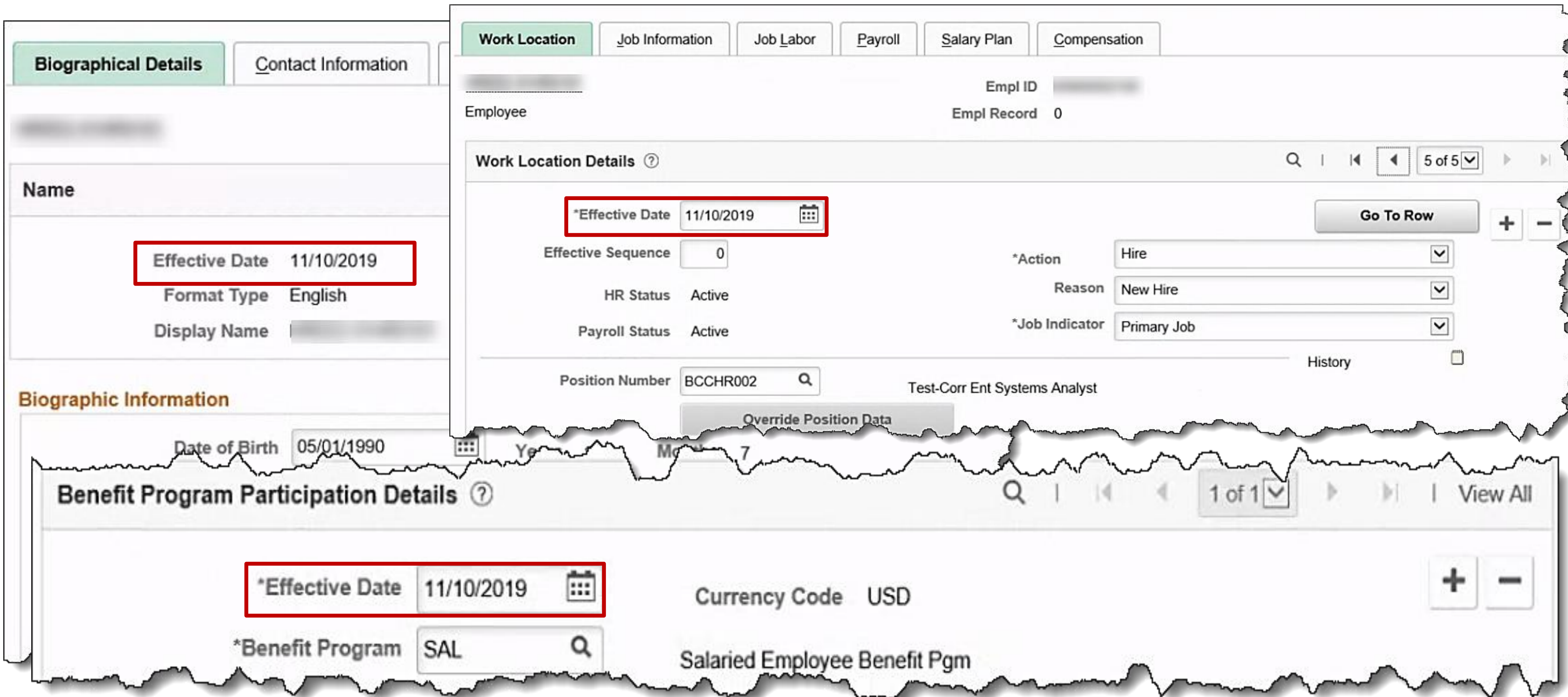
History Rows
Earlier than (<)
The Current Row

Rows Cardinal processed previously

Cardinal Effective Dating (continued)

The Personal Record and Job Record Effective Dating impact each other and other functional areas.

The Effective Date of the hire on the Job Record cannot be prior to the Effective Date on the Personal Data Hire Record.



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. The effective date does not impact anything in the system.

2. When completing a hire, the **Personal Data** page must be effective dated:
   A. After the effective date of the Job Record
   B. Prior to or equal to the effective date of the Job Record

3. True or False. When creating a new Position, there is no consideration given to the effective date used.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Lesson Summary

1 Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal HCM data supports the administration of:
  - Human Resources (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)
- All records in Cardinal HCM are effective dated and the importance of effective dates
- Cardinal is a web-based Financial and Human Capital Management System

Lesson

2 Key HCM Concepts

This lesson covers the following topics:

- HR Data Relationships
  - Position Data
  - Personal Data
  - Employee Job Record

HR Data Relationships

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. What three data types can be entered online or interfaced to Cardinal? (Select all that apply)
   A. Positions
   B. Personal Data
   C. Weather Data
   D. Job Data

2. Does the approval process for a new position takes place in Cardinal?
   A. Yes
   B. No

3. What type of data is entered **first** in Cardinal? (Select all that apply)
   A. Direct Deposit Data
   B. Personal Data
   C. Position Data
   D. Employee Data

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

4. What type of data is entered second into Cardinal? (Select all that apply)
   A. Personal Data
   B. Direct Deposit Data
   C. Position Data
   D. Employee Data

5. What items are needed to complete entry of personal data? (Select all that apply)
   A. Effective Date
   B. Name
   C. Date of Birth
   D. SSN
   E. Gender
   F. Email Address

6. H
   A. Effective Date
   B. Position
   C. Home Address
   D. Compensation
   E. Benefits Program

HCM Key Concept

1 POSITION DATA*

Position: DOA10001
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: DOA10002
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: ABC10012
Pos Descr: Store Clerk
Business Unit: 99900
Reports To: ABC10123

3 JOB DATA*

Empl ID: 00100123400
Empl Rcd: 0
Position: DOA10001
Business Unit**: 15100
Benefit Program: SAL
Reports To**: DOA10003
Pay Rate: 40,200.00/yr

Empl ID: 00100123600
Empl Rcd: 0
Position: DOA10002
Business Unit**: 15100
Benefit Program: SAL
Reports To**: DOA10003
Pay Rate: 38,200.00/yr

Empl ID: 00100123600
Empl Rcd: 1
Position: ABC10012
Business Unit**: 99900
Benefit Program: WGE
Reports To**: ABC10123
Pay Rate: 12.00/hr

2 PERSONAL DATA*

Empl ID: 00100123400
Name: Jane Doe
Address: 123 Main Street, Richmond, VA 23222
SSN: 123-45-6789

Empl ID: 00100123600
Name: Mark Thomas
Address: 123 Valley Dr, Richmond VA 23222
SSN: 345-67-8999

*Fields/data elements listed are only a sample for representative purposes
**Indicates a field on job data that is inherited from position data

Lesson Summary

2 Key HCM Concepts

In this lesson, you learned:

- Position and job share a one-to-one relationship (for most agencies)
- The position is created and associated with a job before an employee is linked to the position
- Position numbers are unique IDs
- Employee personal data is required to save the new hire record
- Employee data is changed on the job record, not on the position
- Core employee data entered on the personal and job data pages is used by other HCM functional areas

Lesson

3

Setup and Maintain Employee HR Data

This lesson covers the following topics:

- Creating and Maintaining Position Data
- Hiring or Rehiring an Employee
- Approving Employee Self Service Transactions
- Intra-Agency Transfer
- Inter-Agency Transfer
- Maintain Leave Status
- Separate Employee
- Mass HR Data Maintenance

Creating and Maintaining Position Data

Agencies using Cardinal to maintain employee job information and/or participant state health benefits must create/maintain positions in Cardinal.

Agencies continue to utilize agency-specific systems or paper forms to capture position information and route for approvals (e.g., agency budget, HR approvals) within the Agency.

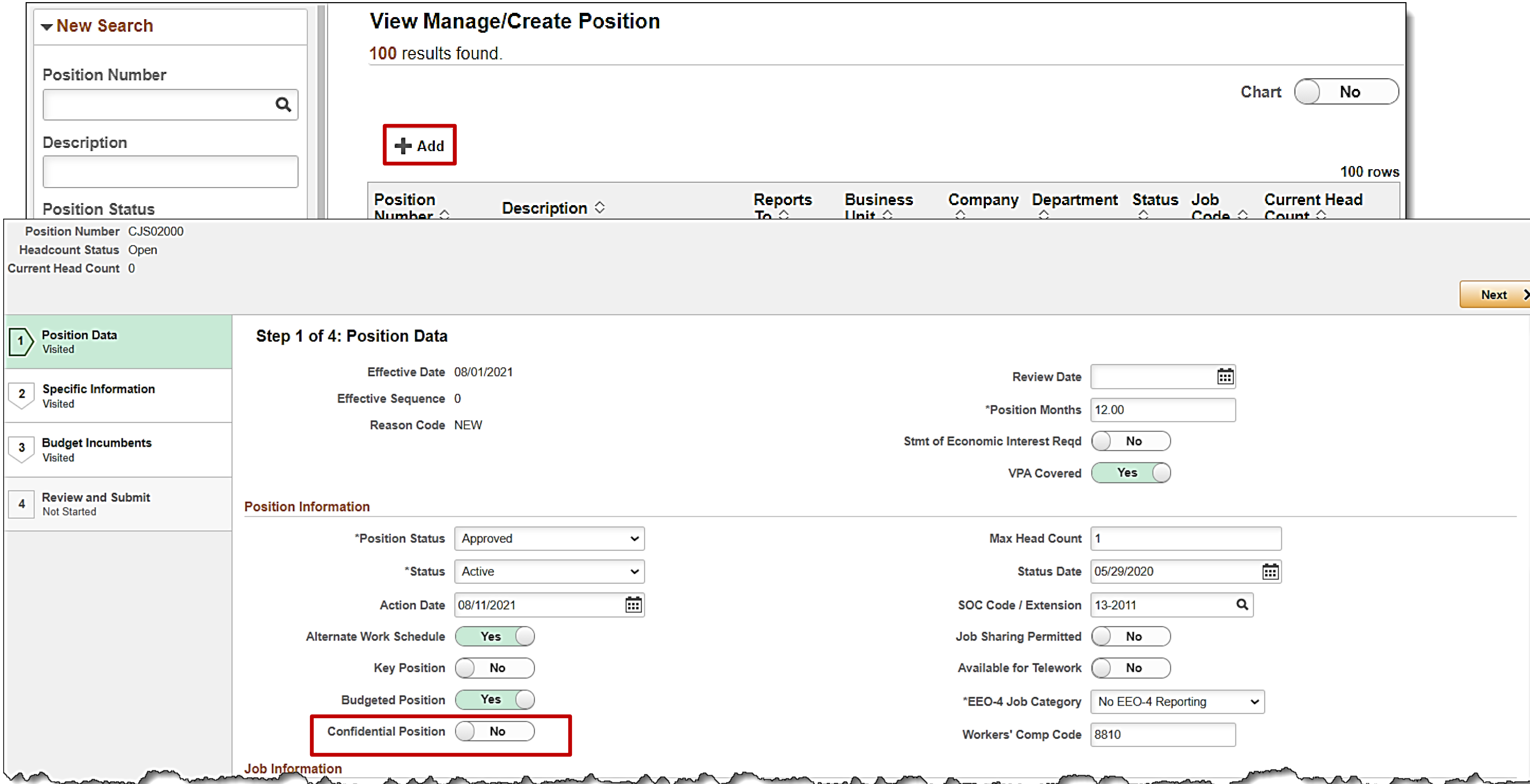
Position Status defaults to “Approved”. Frozen status does not remove position from Employee Position Reporting (EPR) report. Status Inactive removes position from EPR Report.

Positions:
- Required and tracked (vacant or filled)
- Created for all employees
- Created before employee is hired
- Changed at position level then conveyed to Employee Job Record

Position IDs :
- Unique for each agency and begin with three-character alpha prefix that represents Agency (the alpha prefix is Company)
- Parent Agencies can enter positions for child Agencies
- Each agency must develop a process to track the sequential Position IDs

For further information on Creating/Cloning Positions, see the Job Aid titled **HR351 Managing Position Data**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Creating and Maintaining Position Data (continued)

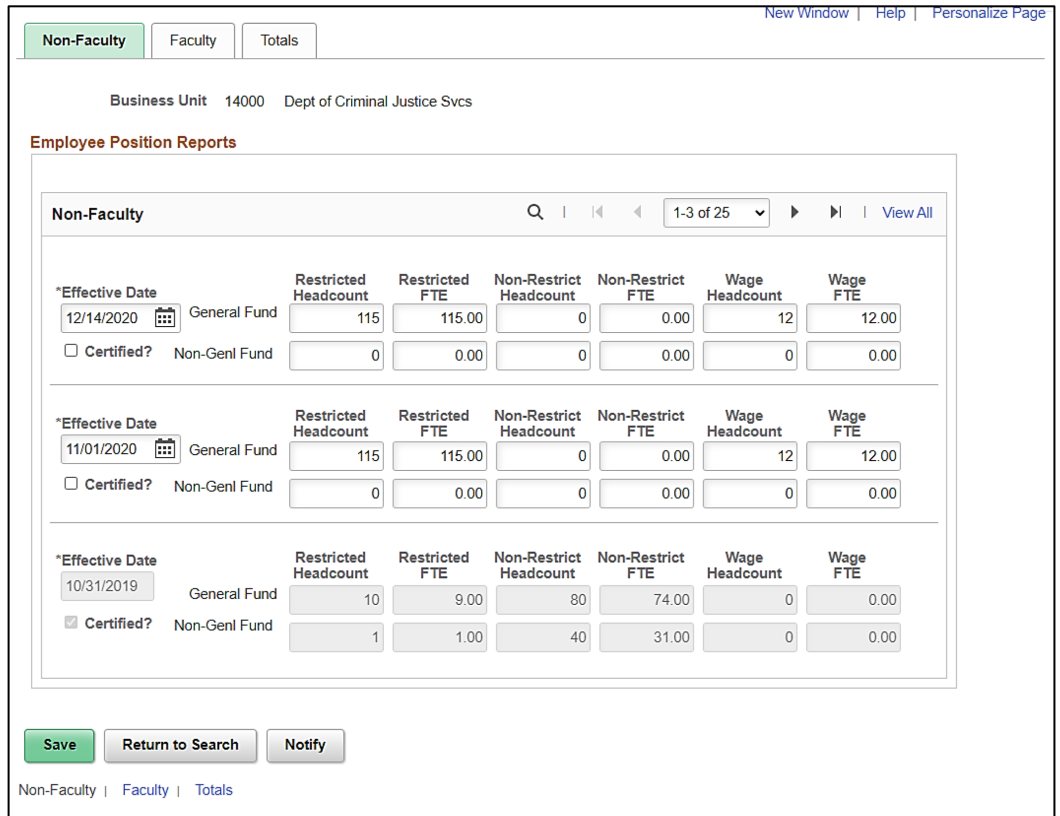


Navigation: Navigator > Organizational Development > Position Management > Maintain Position Budgets > Manage Position

Creating and Maintaining Position Data (continued)

Updating Employee and Position Counts

- Cardinal's custom Employee Position Reporting (EPR) tool resembles current DHRM EPR
  - Generates required data to legislatively mandated reports
  - Automatic batch process runs at end of month to enable Agency HR Teams to use EPR Tool
  - HR Administrators and HR EPR Only Users use to update and certify filled Position counts correctly reflected



New Window | Help | Personalize Page

Non-Faculty | Faculty | Totals

Business Unit 14000 Dept of Criminal Justice Svcs

Employee Position Reports

Non-Faculty 1-3 of 25 View All

*Effective Date	Certified?	Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	☐	General Fund	115	115.00	0	0.00	12	12.00
		Non-Genl Fund	0	0.00	0	0.00	0	0.00
11/01/2020	☐	General Fund	115	115.00	0	0.00	12	12.00
		Non-Genl Fund	0	0.00	0	0.00	0	0.00
10/31/2019	☑	General Fund	10	9.00	80	74.00	0	0.00
		Non-Genl Fund	1	1.00	40	31.00	0	0.00

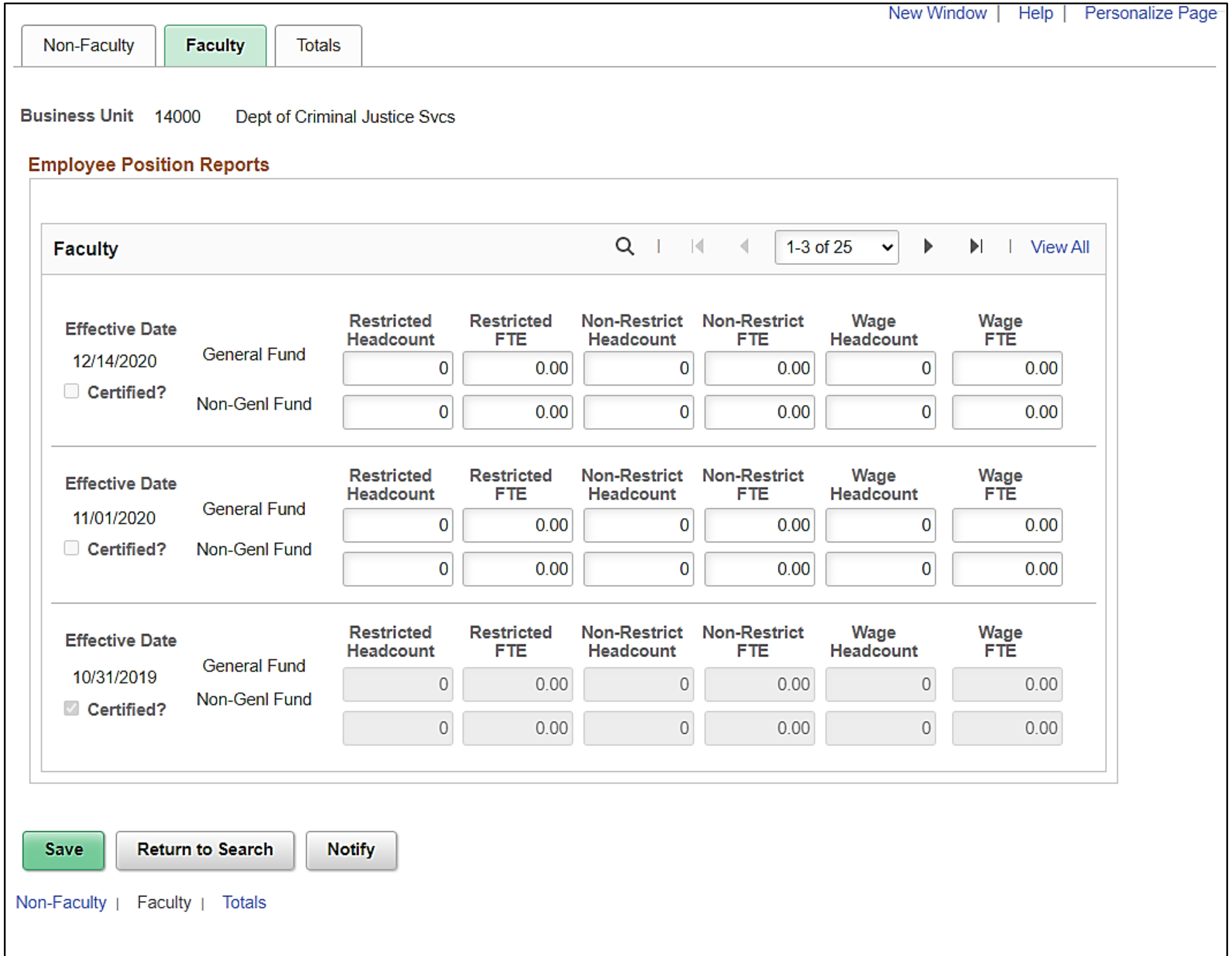
Save | Return to Search | Notify

Non-Faculty | Faculty | Totals

Navigation: Navigator > Workforce Administration > EPR Tool

Creating and Maintaining Position Data (continued)

Faculty tab


New Window | Help | Personalize Page

Non-Faculty | **Faculty** | Totals

Business Unit 14000 Dept of Criminal Justice Svcs

Employee Position Reports

Faculty | 1-3 of 25 | View All

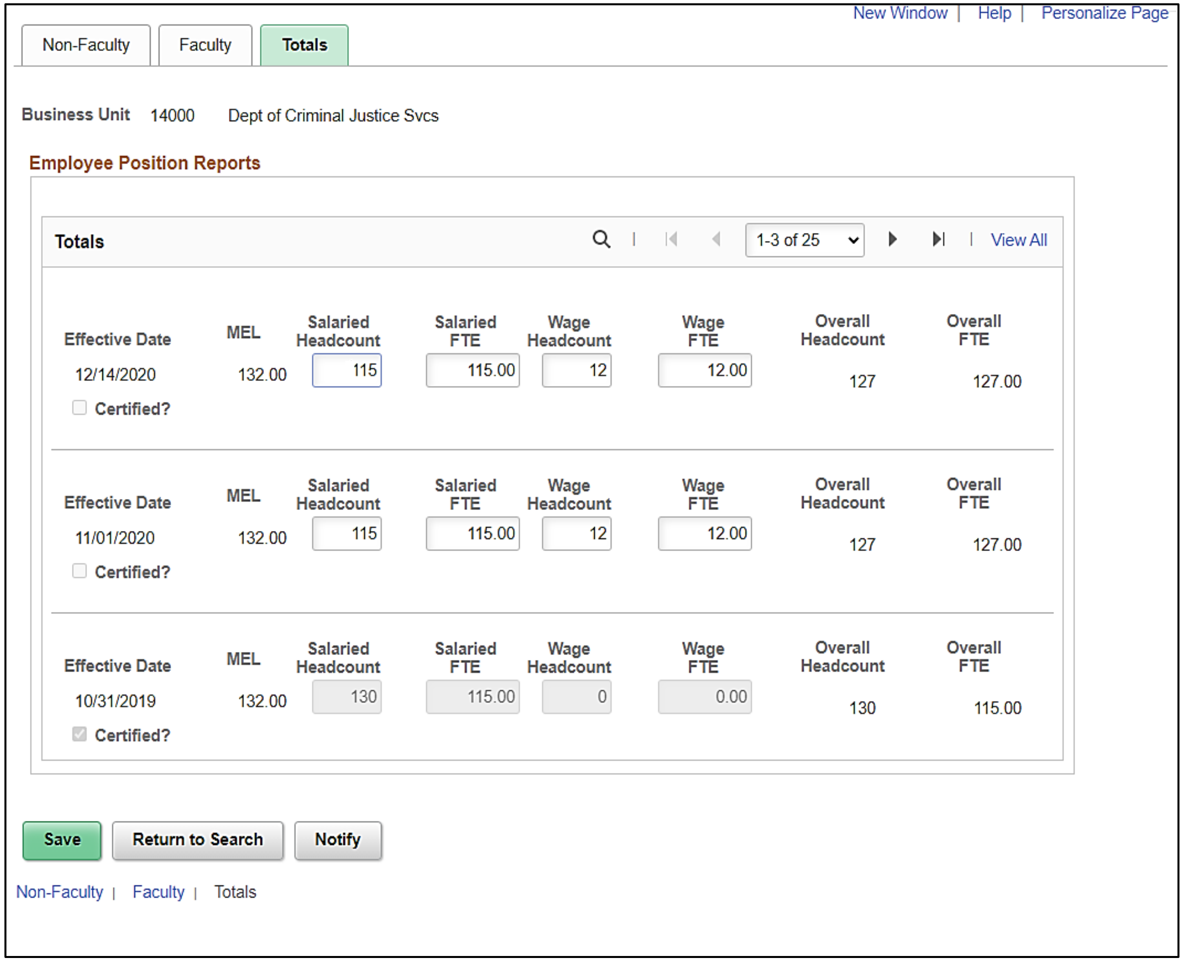
Effective Date	Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	General Fund	0	0.00	0	0.00	0	0.00
Certified?	Non-Genl Fund	0	0.00	0	0.00	0	0.00
11/01/2020	General Fund	0	0.00	0	0.00	0	0.00
Certified?	Non-Genl Fund	0	0.00	0	0.00	0	0.00
10/31/2019	General Fund	0	0.00	0	0.00	0	0.00
Certified?	Non-Genl Fund	0	0.00	0	0.00	0	0.00

Save | Return to Search | Notify

Non-Faculty | Faculty | Totals

Creating and Maintaining Position Data (continued)

Totals tab



For further information on Using the EPR Tool, see the Job Aid titled **HR351 EPR Tool**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Agency HR will have the ability to:
   a) Add, Clone, Update Positions
   b) Clone Positions only
   c) Delete Positions

2. What value defaults to unknown on the personal data record?
   a) Name
   b) Gender
   c) Birth date

3. True or False. The Job Record does not require an effective date.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

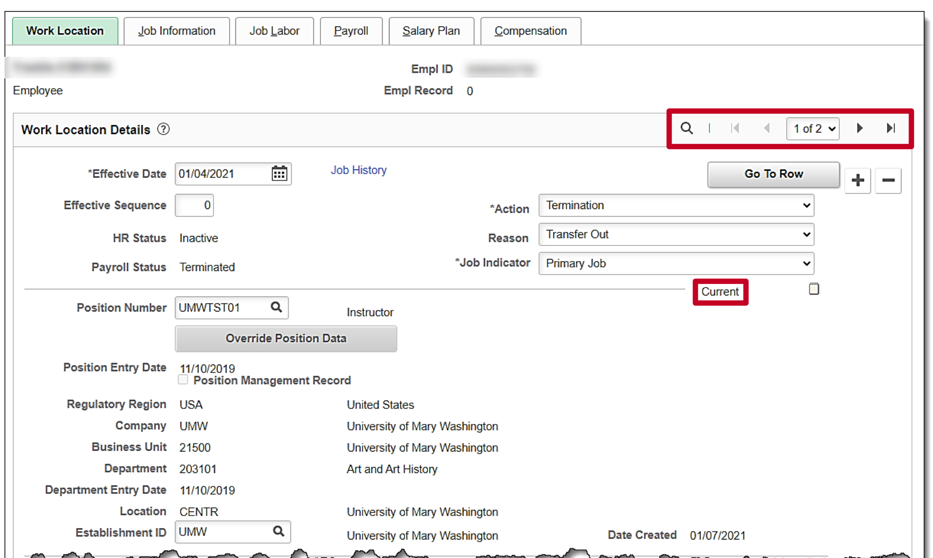
If you have any questions, please ask your instructor.

Hiring or Rehiring an Employee

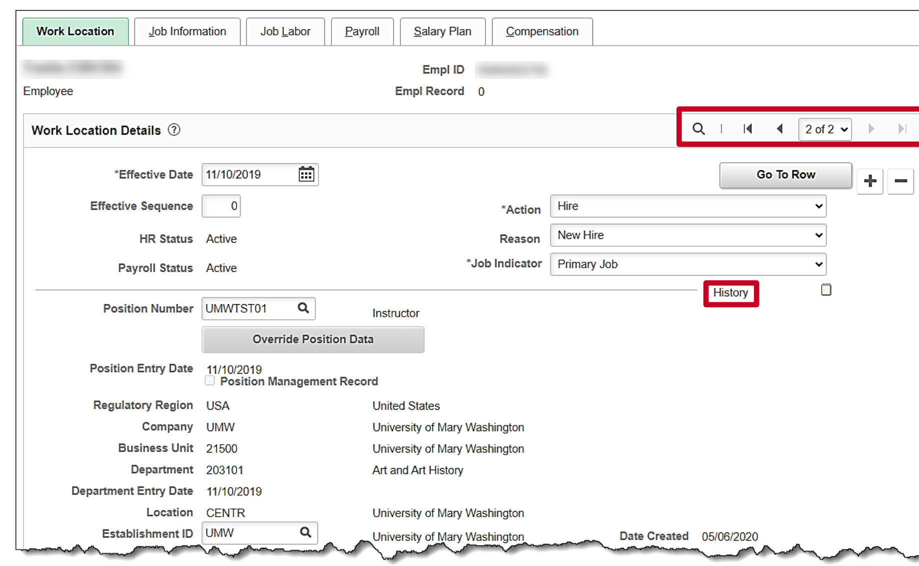
Key Points about the Hire/Rehire business process include:

- Applies to both salaried and wage employees
- Also used when transferring an employee from one agency to another
- Link the employee to New Hire Checklist to guide them through the COVA New Hire tasks
- Job activity and changes viewed on **Job Data** page
  - Stores all current and historical job data related to employee
  - Use Effective Sequencing if multiple transactions with same effective date

Current Row



History Row



For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning.**

Hiring or Rehiring an Employee (continued)

Personal Data Information

Employee IDs

Prior to completing the new hire or rehire, the Agency HR does an Employee Search Match in Cardinal to find out if the new hire already exists in the Cardinal system.

- If a match is not found, a new employee ID will be generated by Cardinal when the new hire action is completed.
- If a match is found (SSN and Name in system must match new entry), the Agency HR updates the applicable employee job data record.

For agencies with their own HR systems that elect to interface with Cardinal HCM, an upload interface allows agencies to send employee new hire records without an employee ID number. Cardinal then assigns this employee ID number as part of the upload step. The process to complete a new hire upload interface is covered later in this course.

Temporary Social Security Number (SSN) is needed

Prior to starting the New Hire/Rehire process make sure that all of the new hire paperwork is in place.

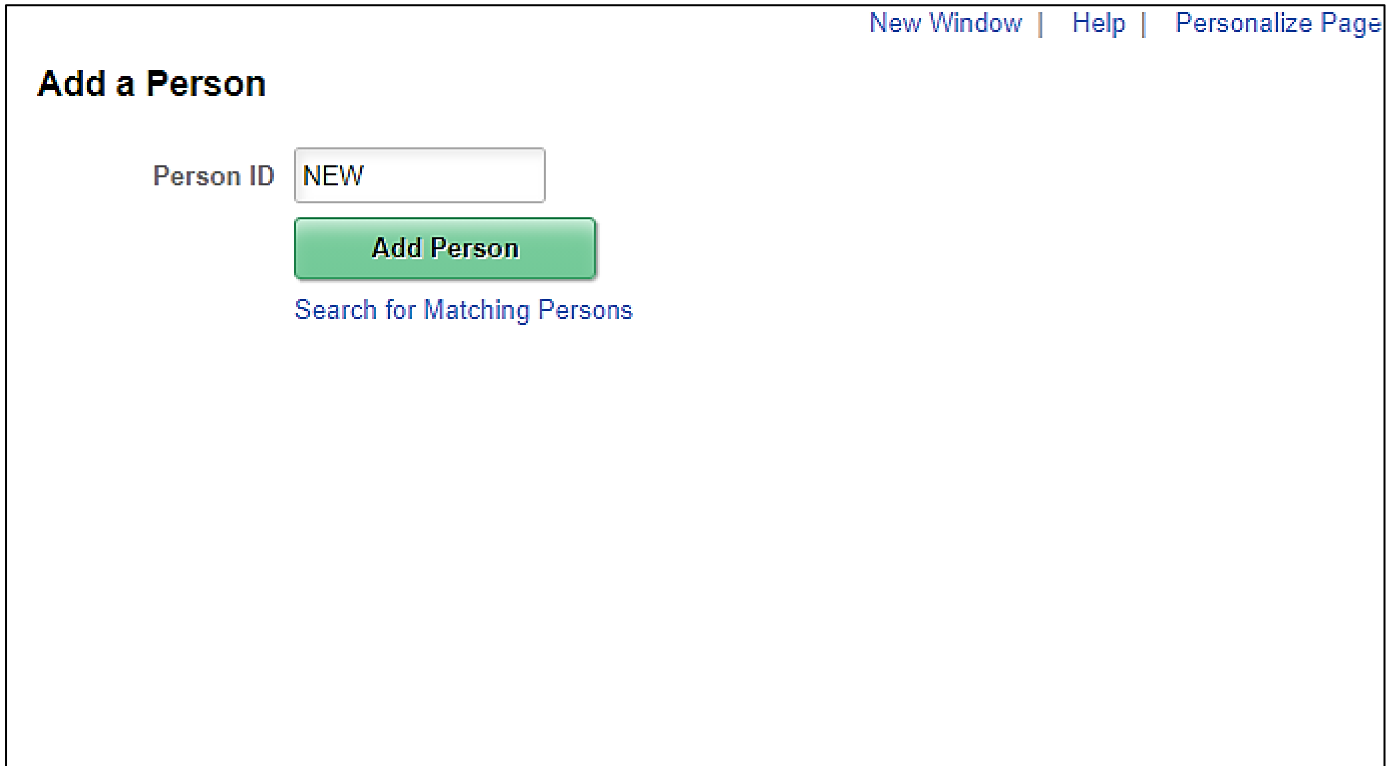
On occasions, the employee's SSN may not be available at the time an employee record is created in Cardinal, either because the employee is a new hire and has not provided an SSN, or an employee is awaiting an SSN. In order to save the employee record in Cardinal, the SSN field must be populated. It is therefore necessary to obtain a temporary SSN in order to save an employee record when a permanent SSN is not available.

For further information on hiring an employee, see the Job Aid titled **R2 HR351 Completing a New Hire**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.

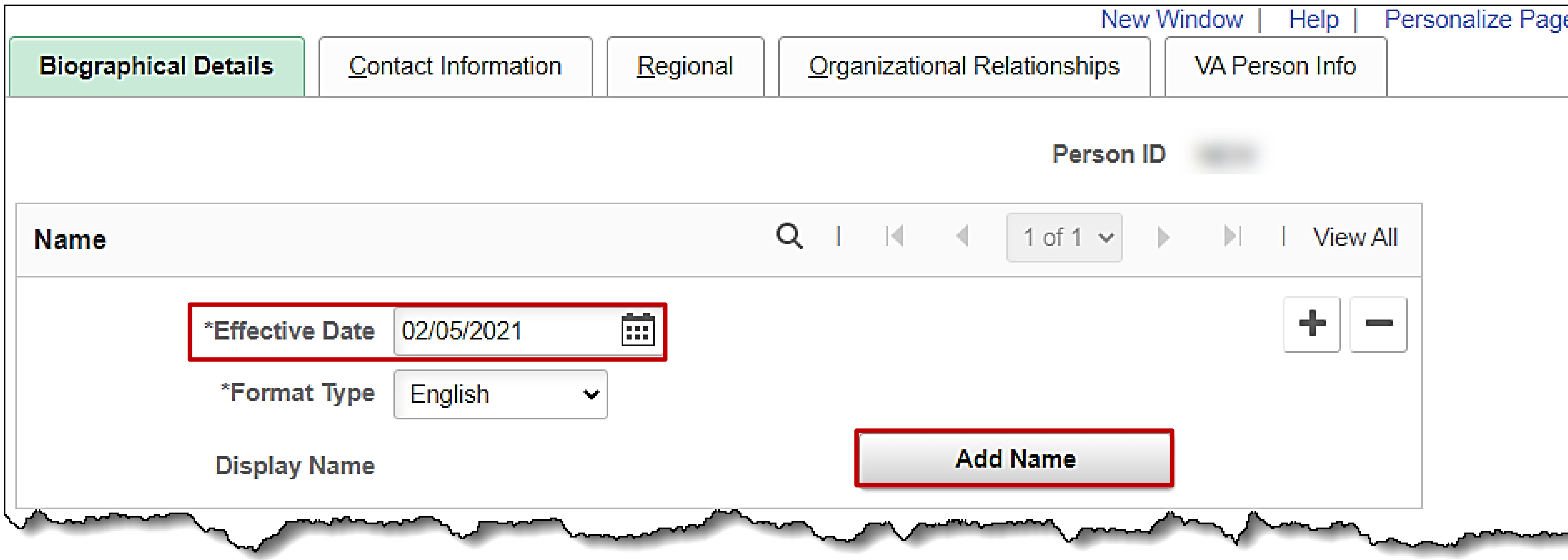
For further information on hot to assign a temporary SSN to an employee, see the Job Aid titled **R2 HR351 Assigning and Monitoring Temporary SSN**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.

Hiring or Rehiring an Employee (continued)

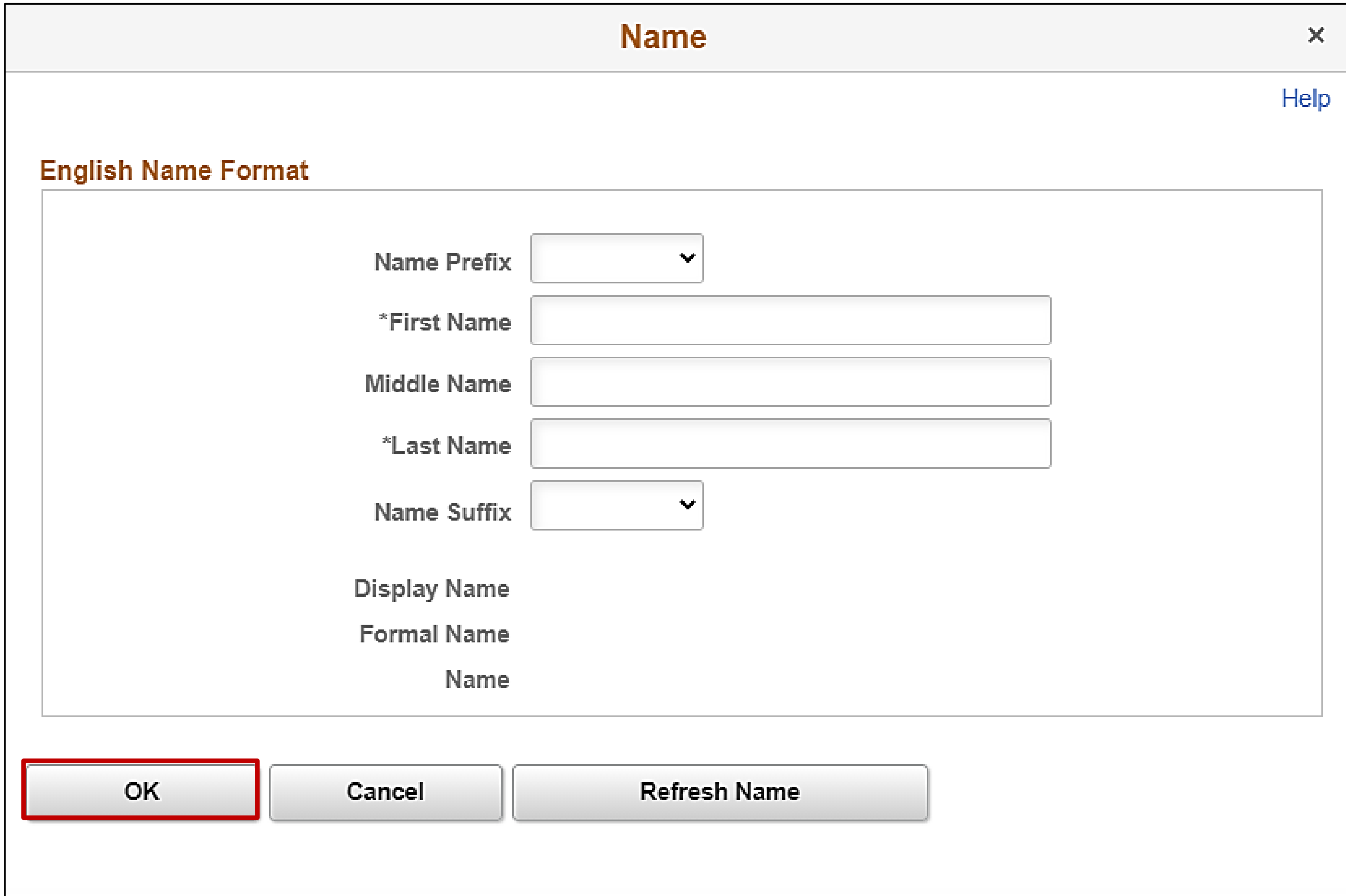
After completing the employee search match, if an employee id was not found you will click on the **Add Person** button and the Cardinal system will auto-assign Employee ID;



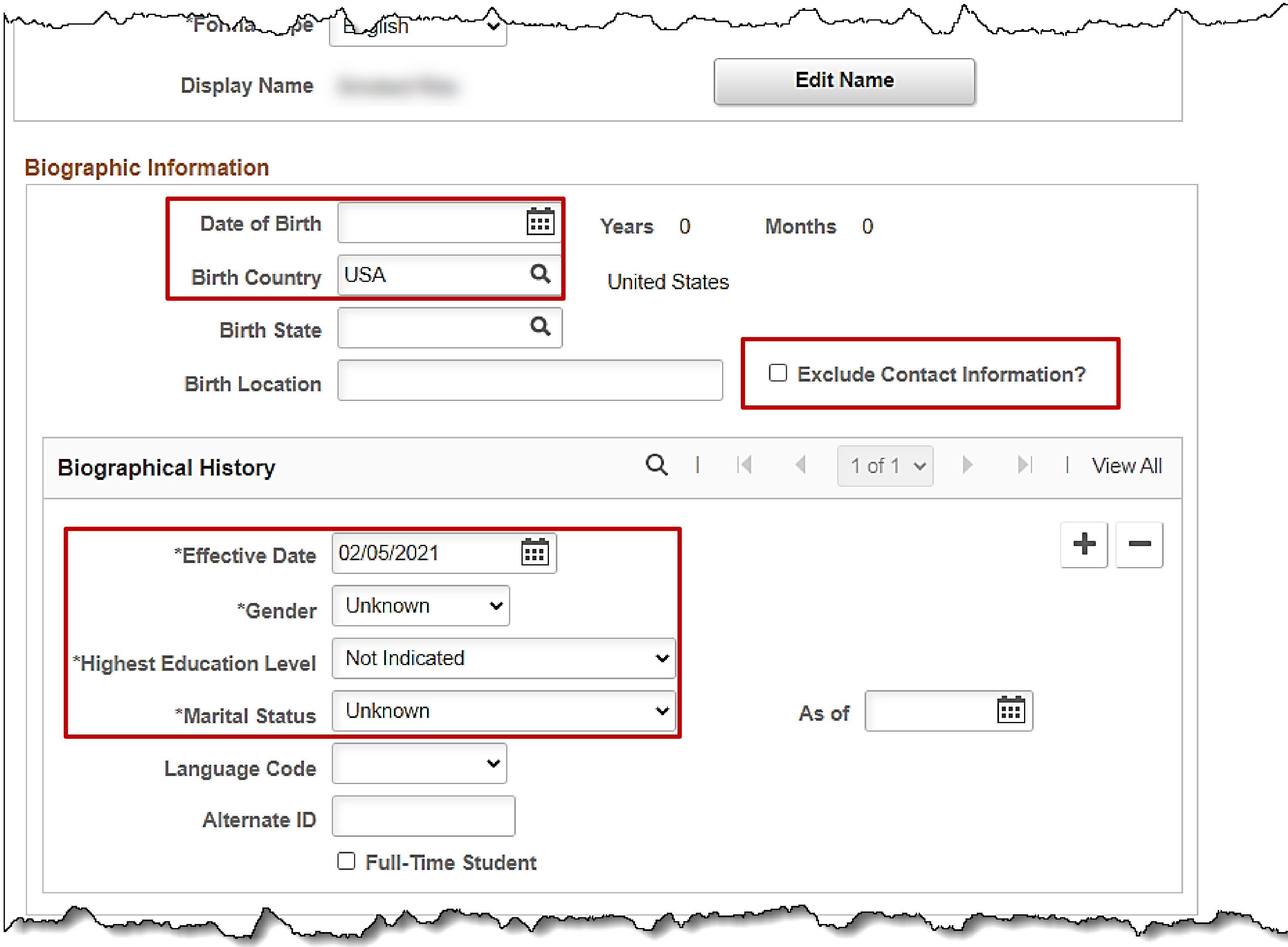
Hiring or Rehiring an Employee (continued)



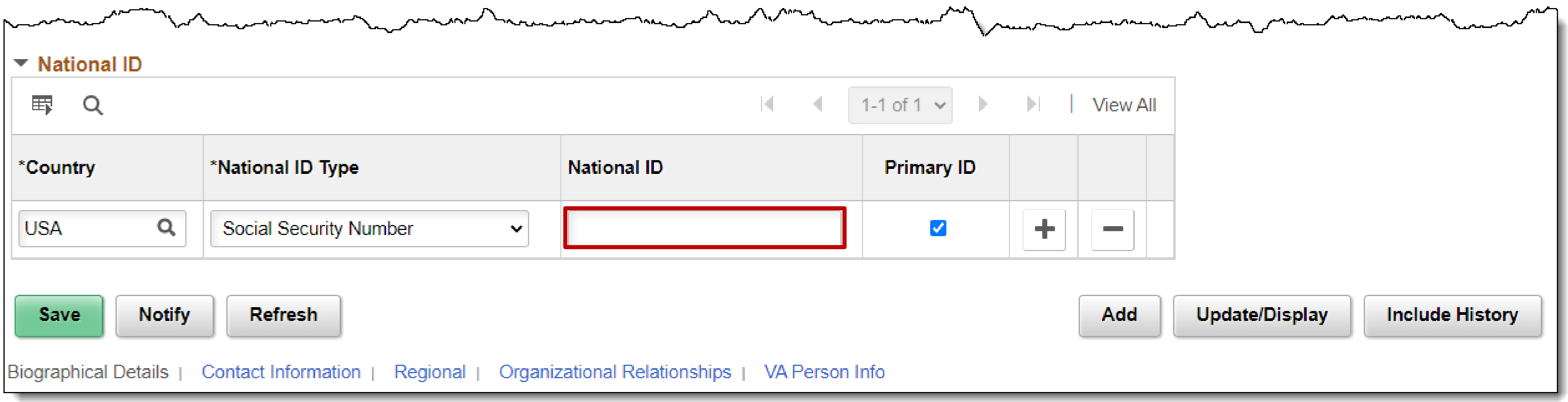
Hiring or Rehiring an Employee (continued)



Hiring or Rehiring an Employee (continued)

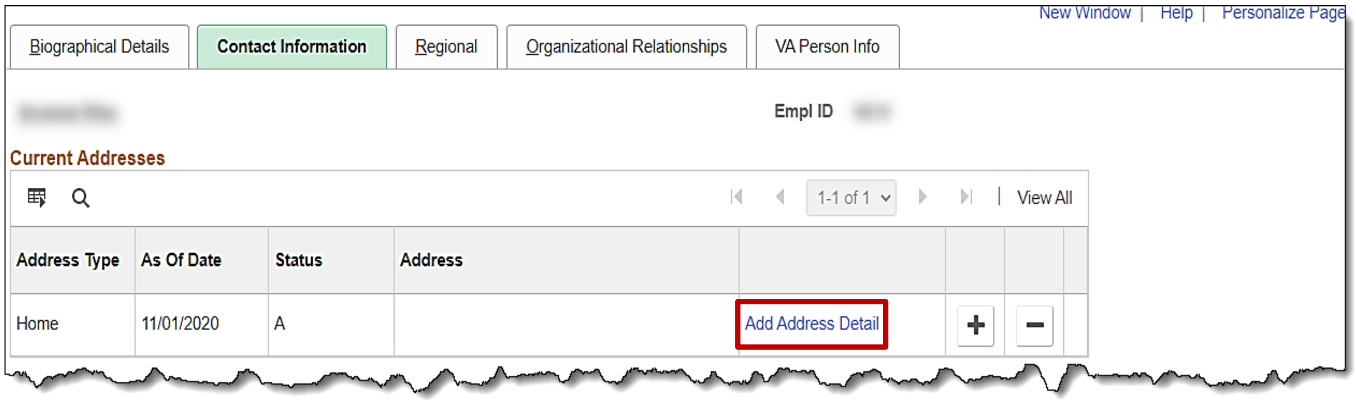


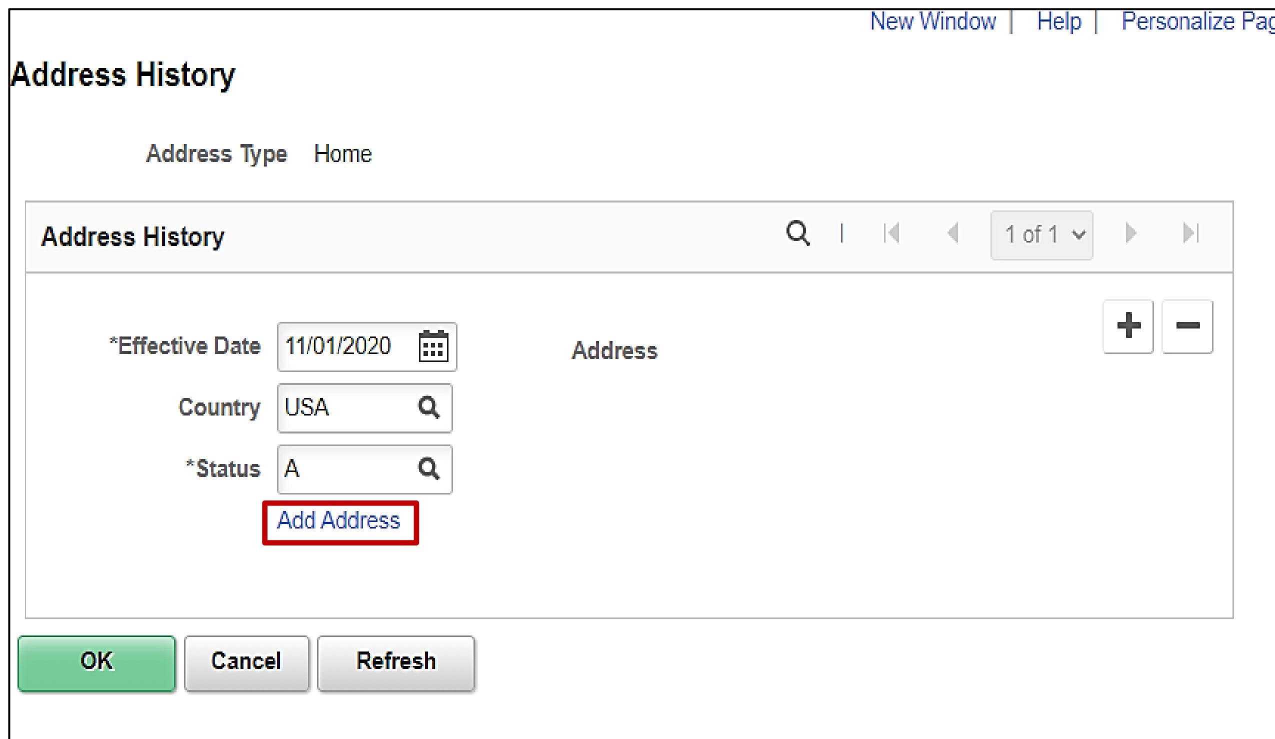
Hiring or Rehiring an Employee (continued)



Note: The **National ID** field is required for all employees. Employees without a Social Security Number (SSN) are assigned a temporary number until a permanent SSN is received. For further information on Monitoring Temporary SSN, see the **HR351 Monitoring Temporary SSN**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.

Hiring or Rehiring an Employee (continued)

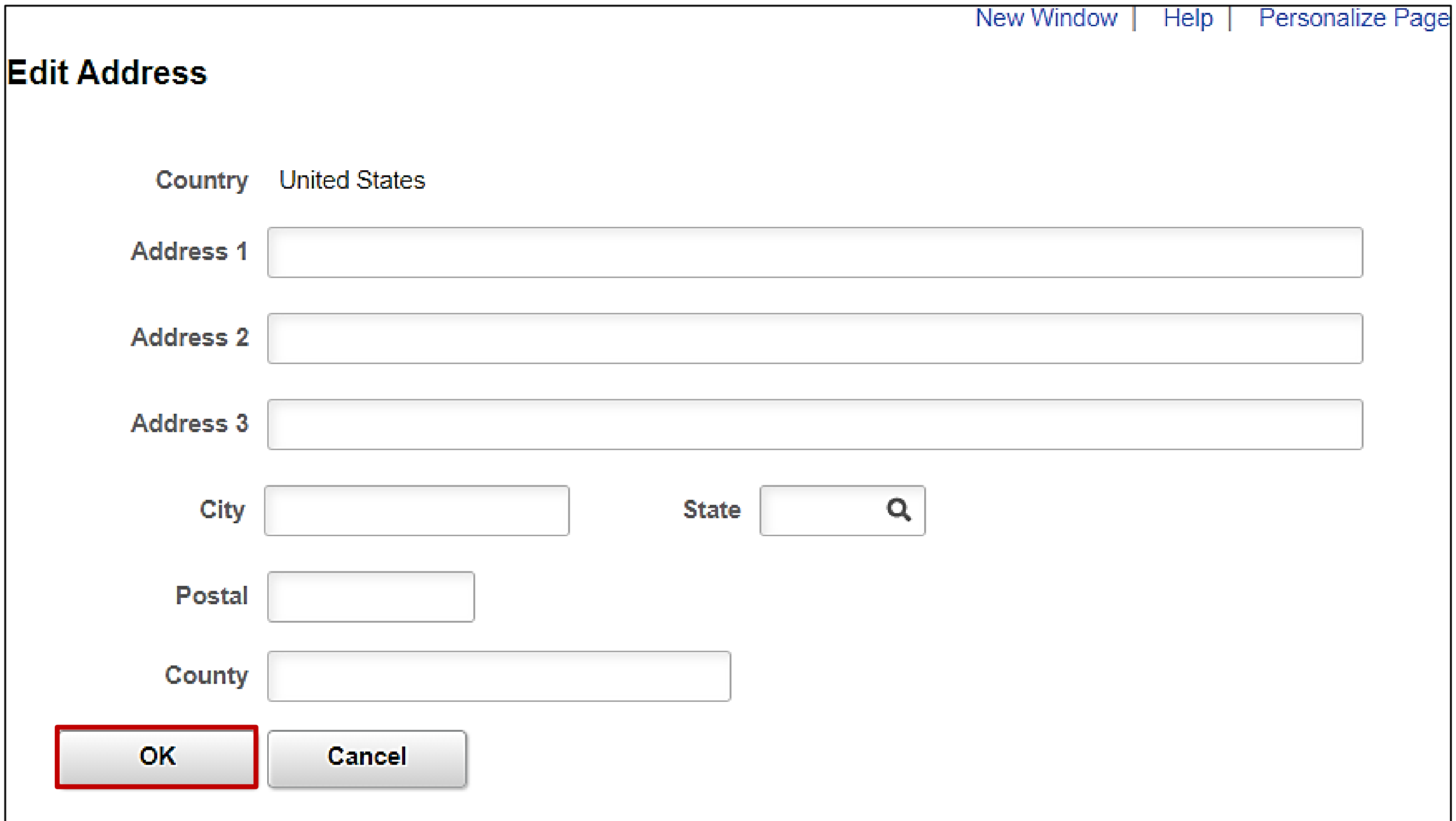




Hiring or Rehiring an Employee (continued)

The following address fields are required in order to save the personal data record:

- Address 1
- City
- State
- Postal Code (full 9-digit zip code not required)



Note: The state selected as part of the address has a direct impact on benefit options and payroll taxes.

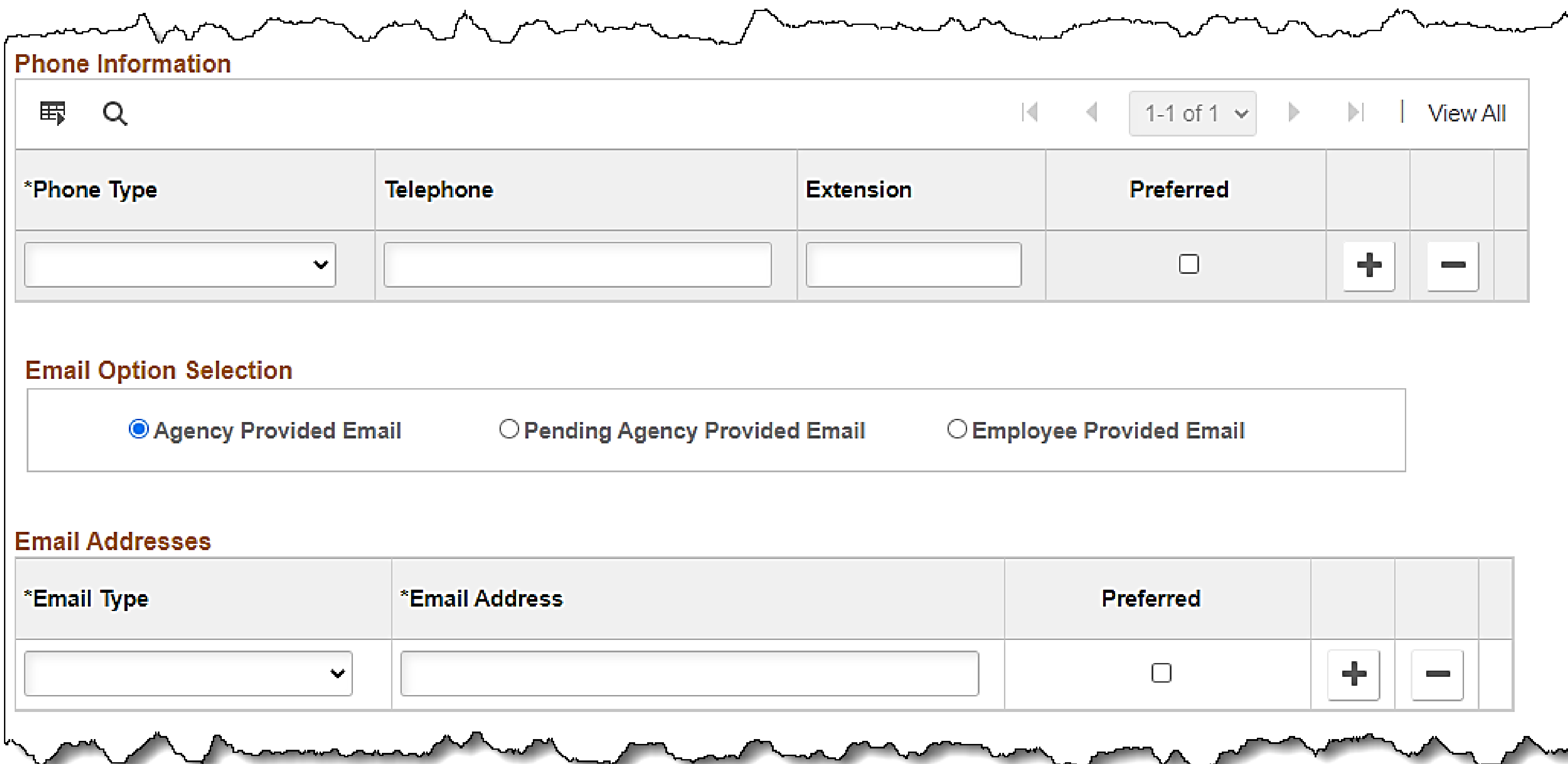
Hiring or Rehiring an Employee (continued)

The **Phone Information** section is required but does not have to be unique.

- Obtain and enter employee's accurate Phone Type and Telephone Number if available.

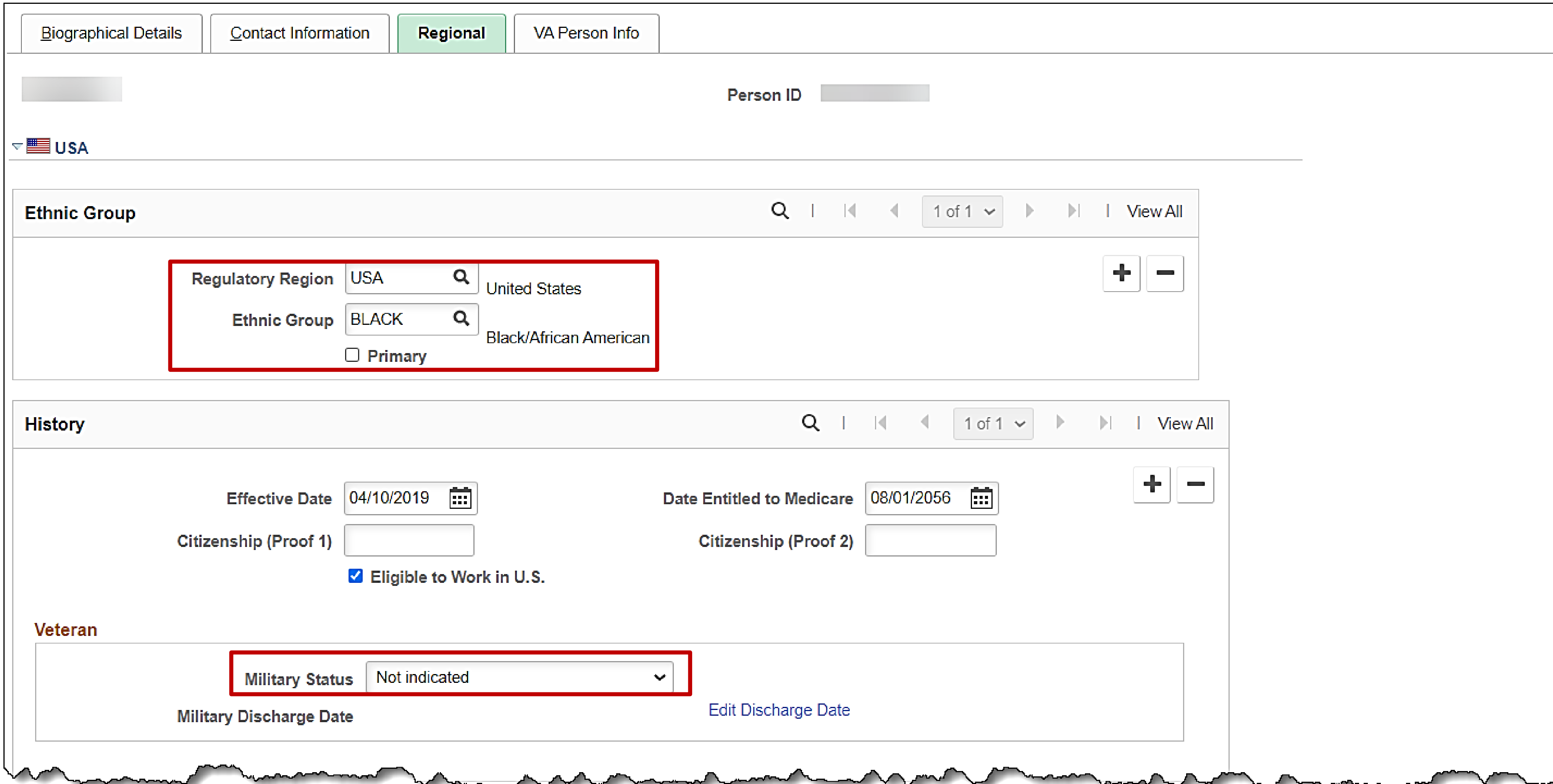
The Virginia Information Technologies Agency's (VITA) cloud-based Identify Access Management tool (Okta) authenticates agency users and requires valid email address.

- Preferred email address required to ensure all employees (active and inactive) have consistent access.



Hiring or Rehiring an Employee (continued)

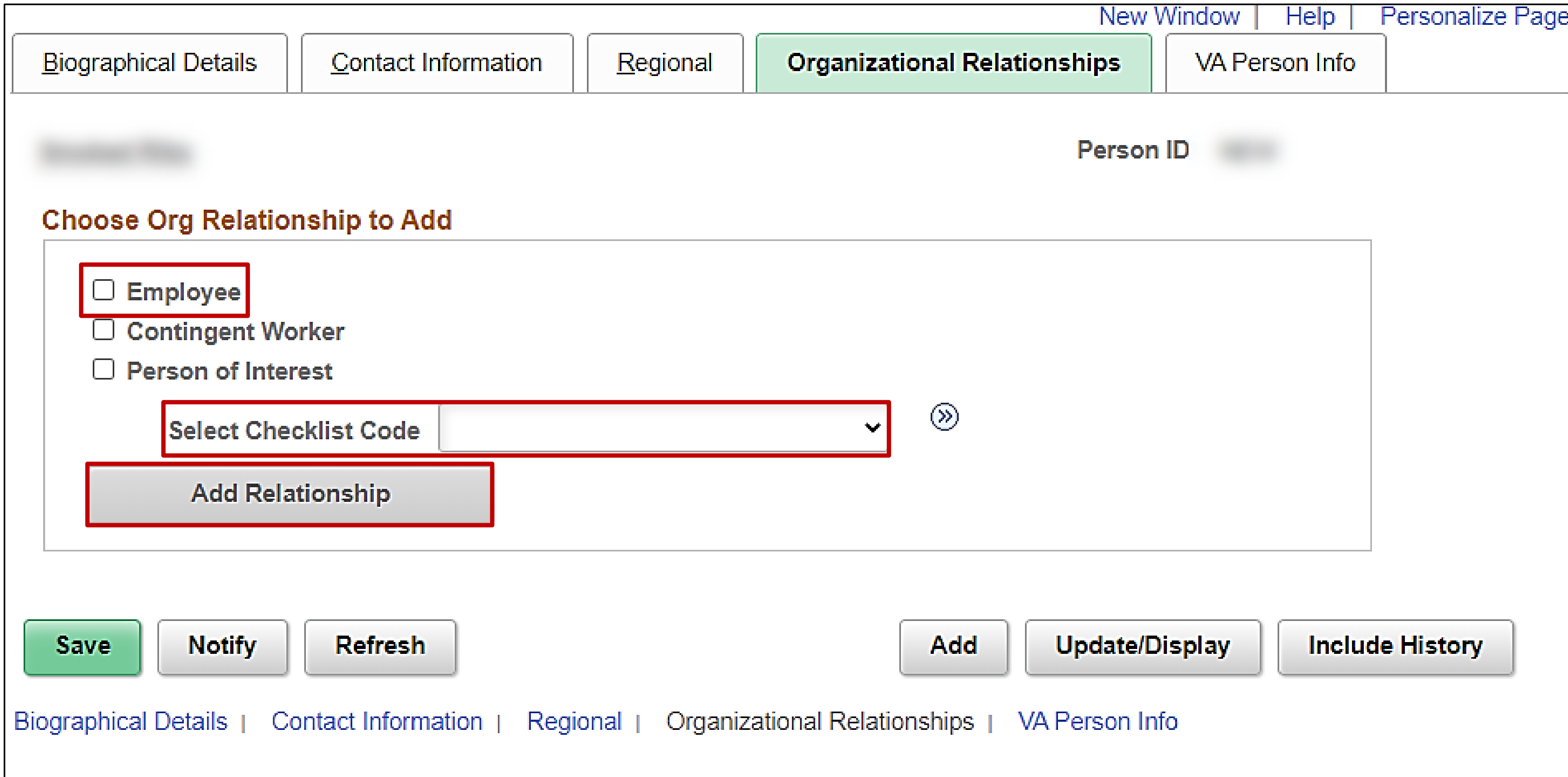
Employees can identify as multiple ethnic groups, which helps drive multiple reports and initiatives.



Hiring or Rehiring an Employee (continued)

To add an Employee Relationship:

1. Select the **Employee** checkbox
2. Select “**Hire**” from the **Select Checklist Code** drop-down menu
3. Click the **Add Relationship** button



Hiring or Rehiring an Employee (continued)

Key points about the Hire/Rehire business process include:

- Effective date represents hire or rehire date (can be future dated)
- Effective date must be greater than or equal to effective date of Personal Data entered
- Action/Action Reason describes hire/rehire reason
  - Action activates HR and Payroll statuses
  - Reason activates Benefits status
- Shared position data populates throughout employee's Job Record
- Enter additional fields (e.g., employee class, pay group, frequency, compensation) on **Job Data** page
- If employee has multiple jobs, they have one employee ID with multiple employee records
- Interface determines correct employee record number based upon agency, position, and employee type (for interfacing agencies)

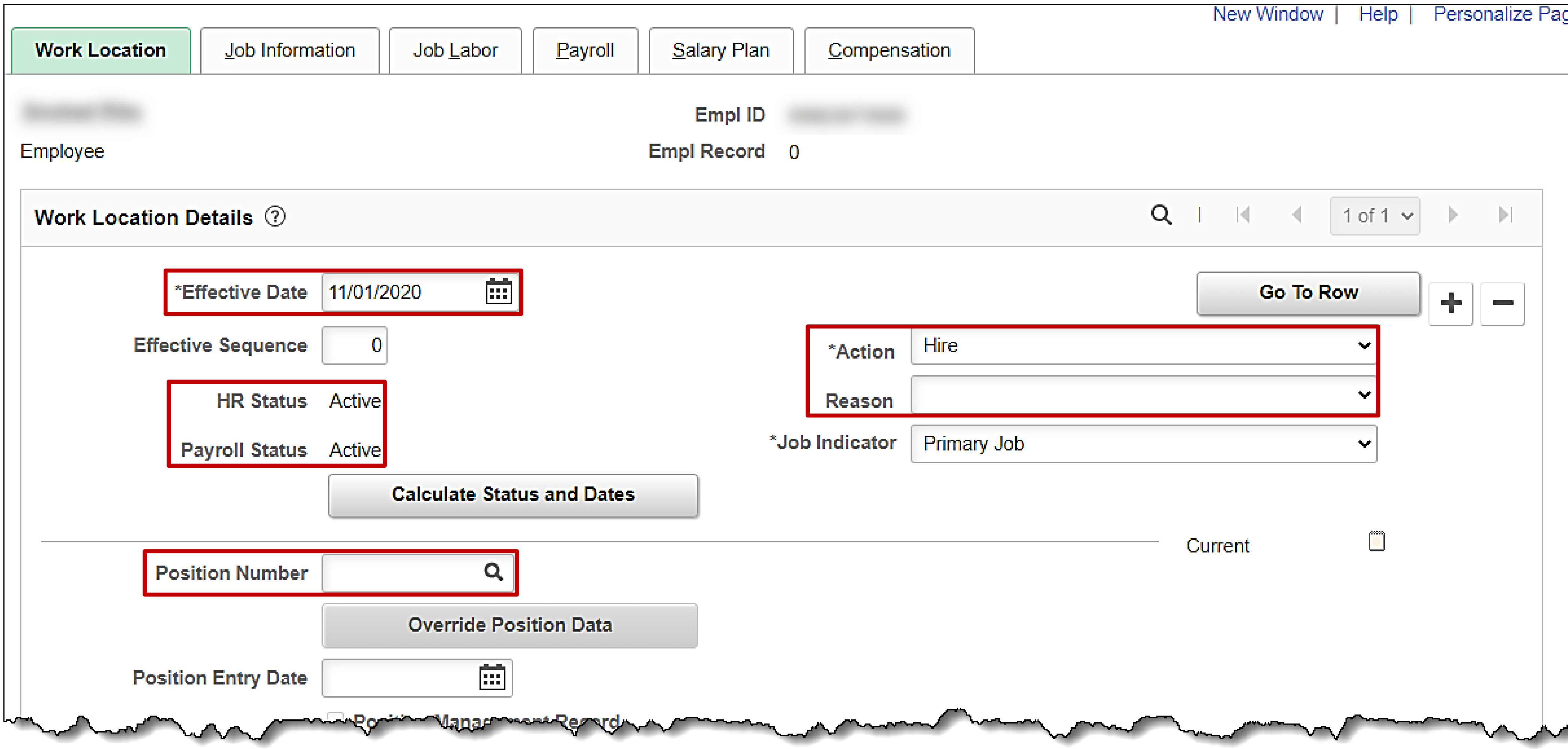
Note: The Action/Reason, Employee Class, and Job Code are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.

For a further information on Action/Action Reason combinations refer to the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on hiring an employee, see the job aid titled **R2 HR351 Completing a New Hire**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Hiring or Rehiring an Employee (continued)

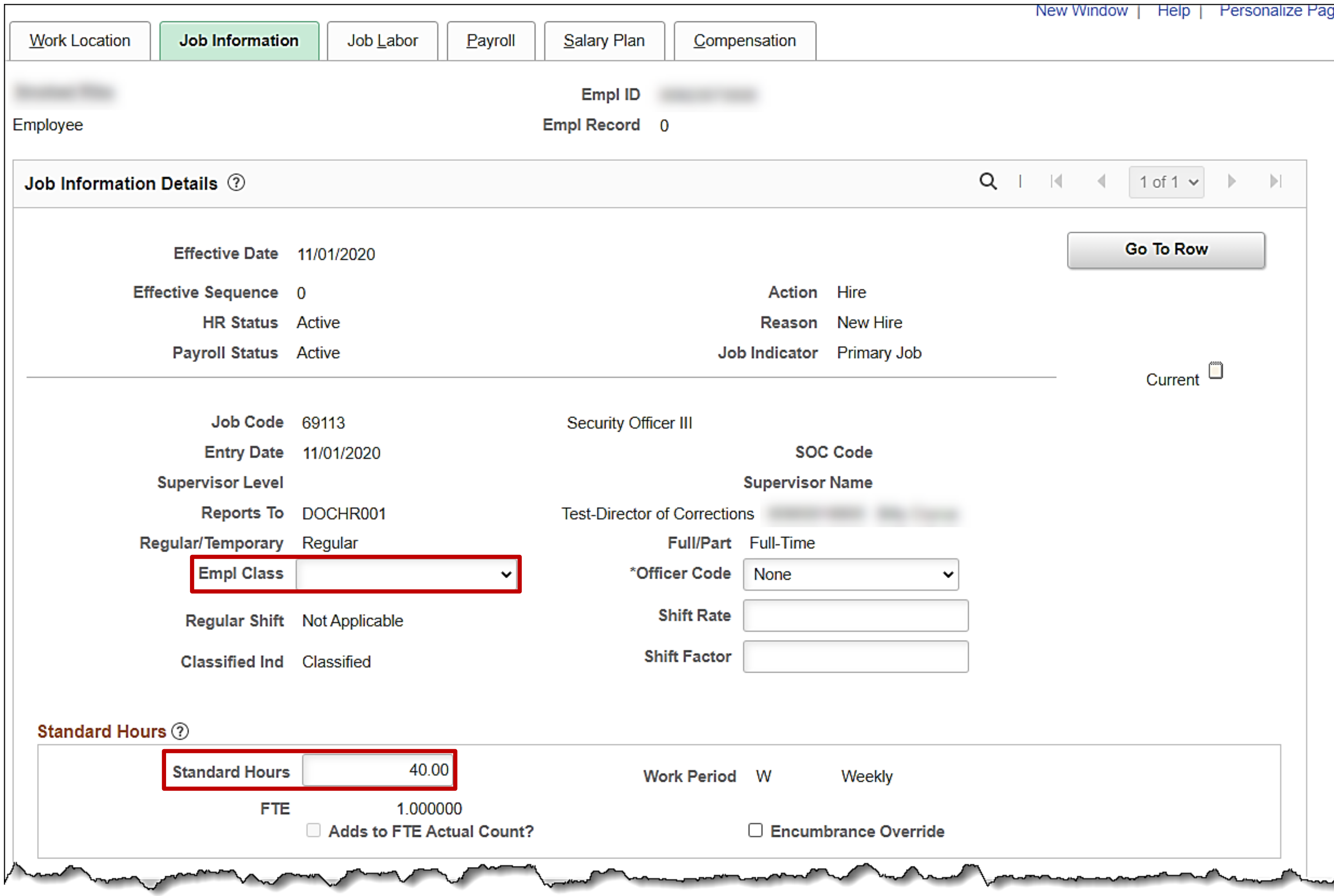
Job Data – Work Location



For further information on Action Reasons, see the Job Aid titled **HR351 Action Reason Table**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

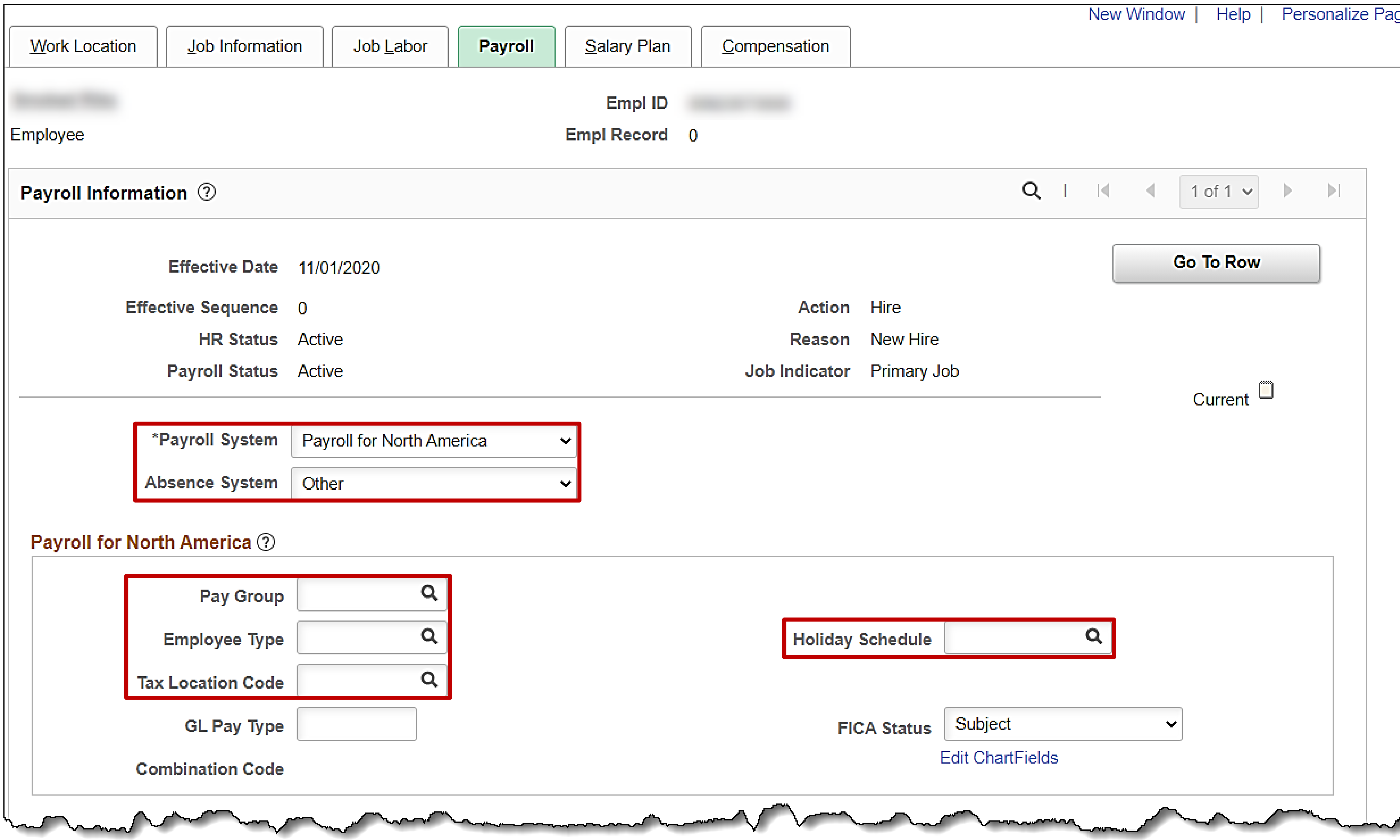
Hiring or Rehiring an Employee (continued)

Job Data – Job Information



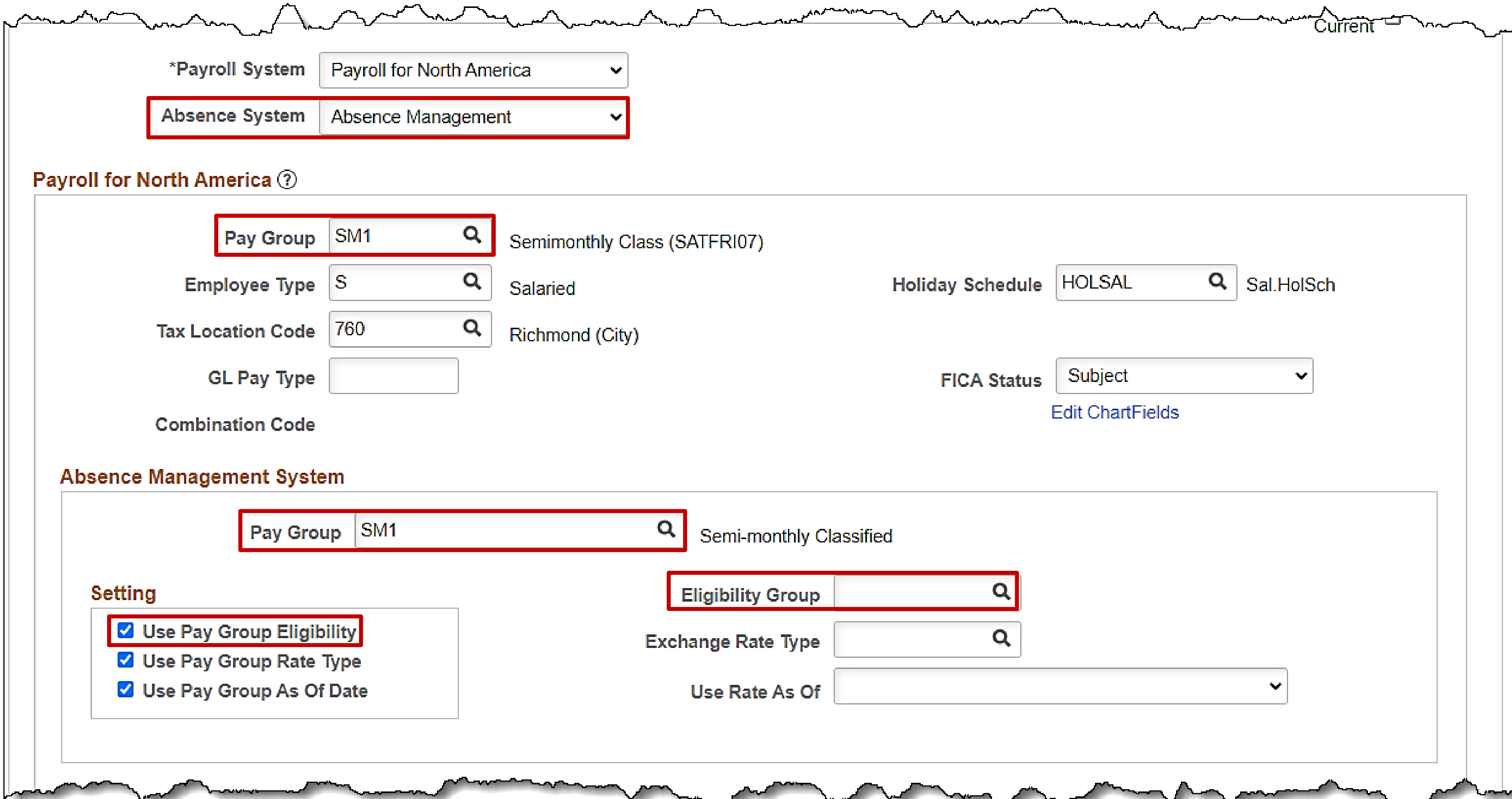
Hiring or Rehiring an Employee (continued)

Job Data – Payroll



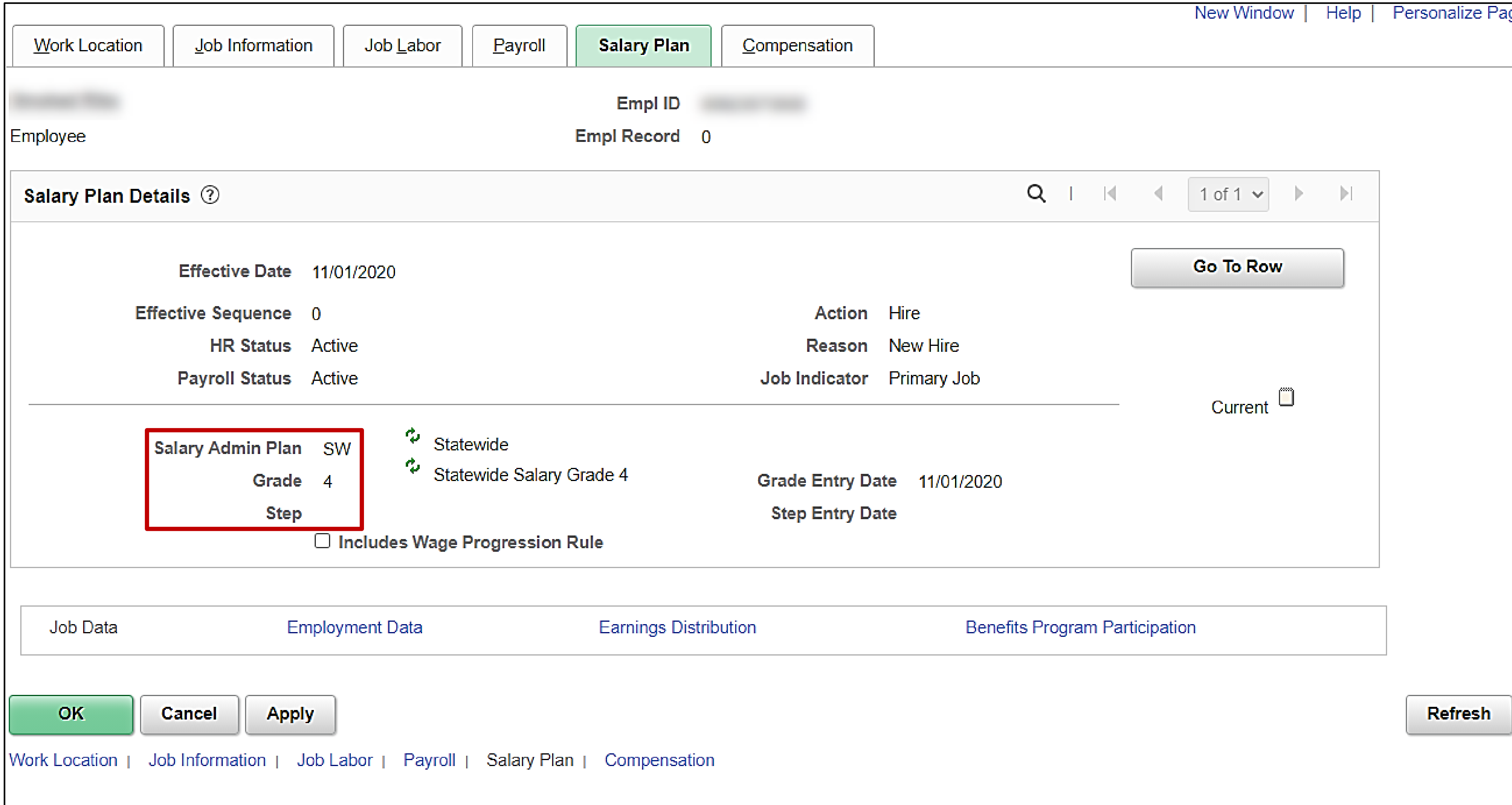
Hiring or Rehiring an Employee (continued)

Job Data – Payroll



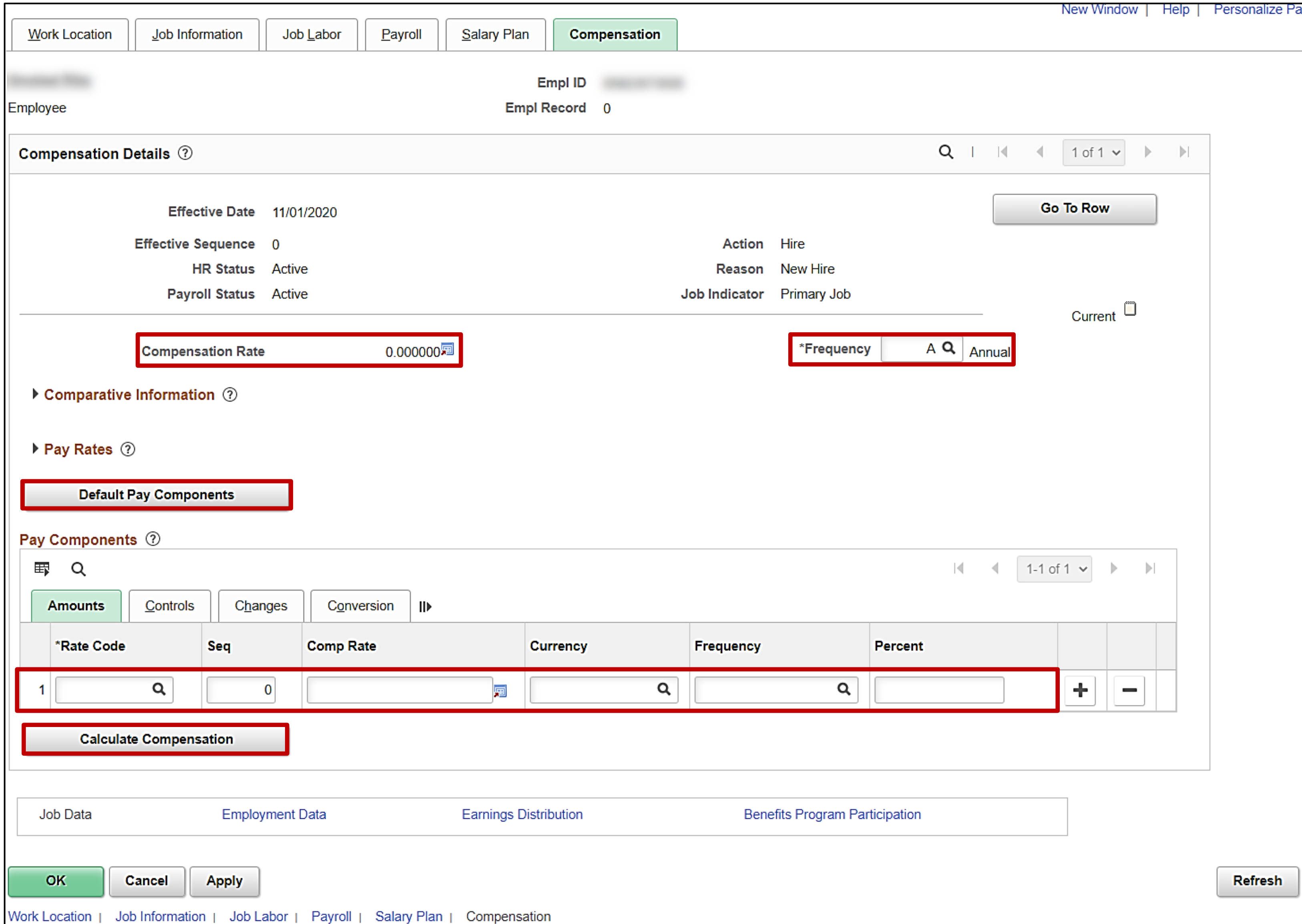
Hiring or Rehiring an Employee (continued)

Job Data – Salary Plan



Hiring or Rehiring an Employee (continued)

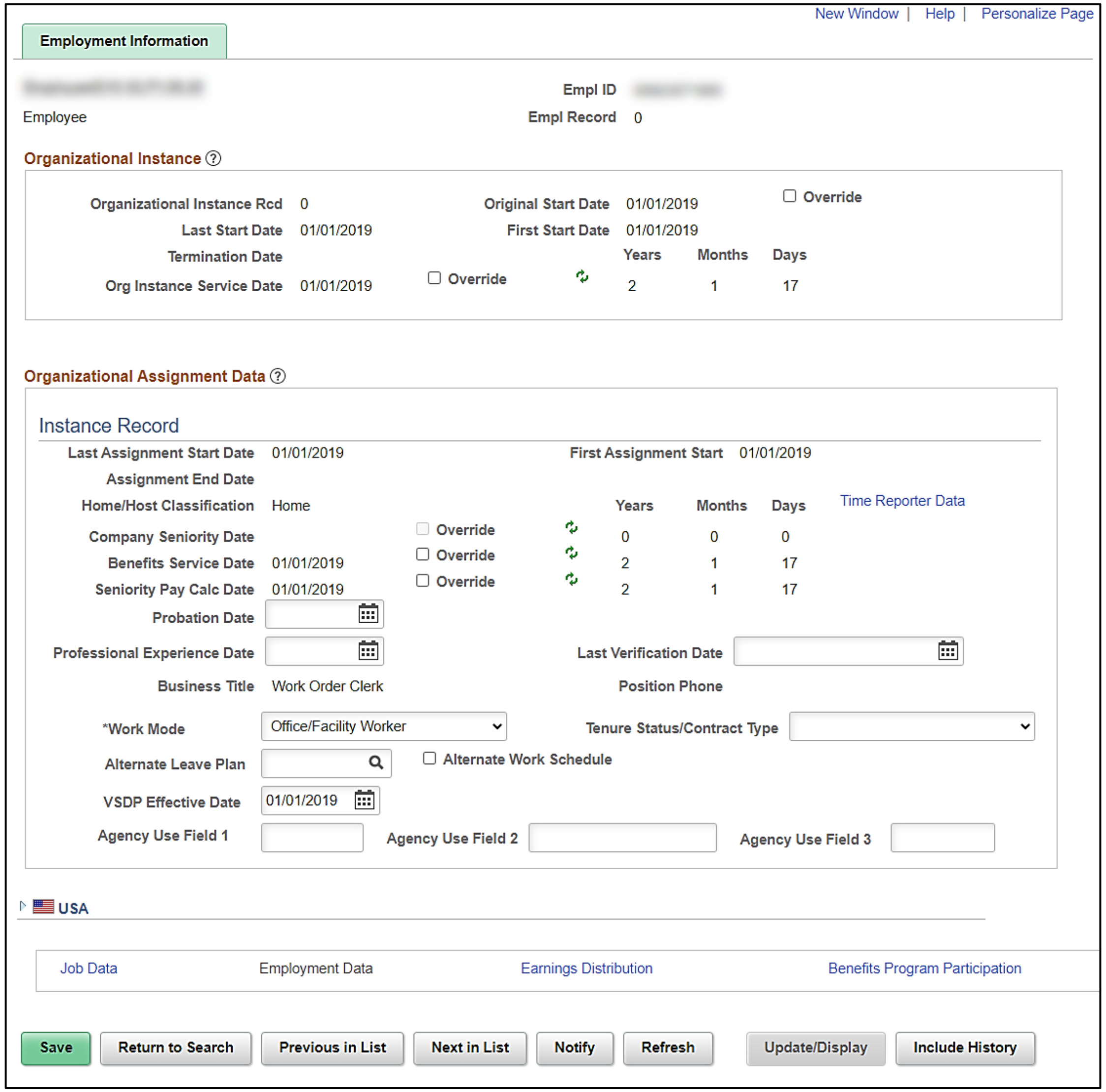
Job Data – Compensation



Hiring or Rehiring an Employee (continued)

Job Data – Employment Data (Waged Employee)

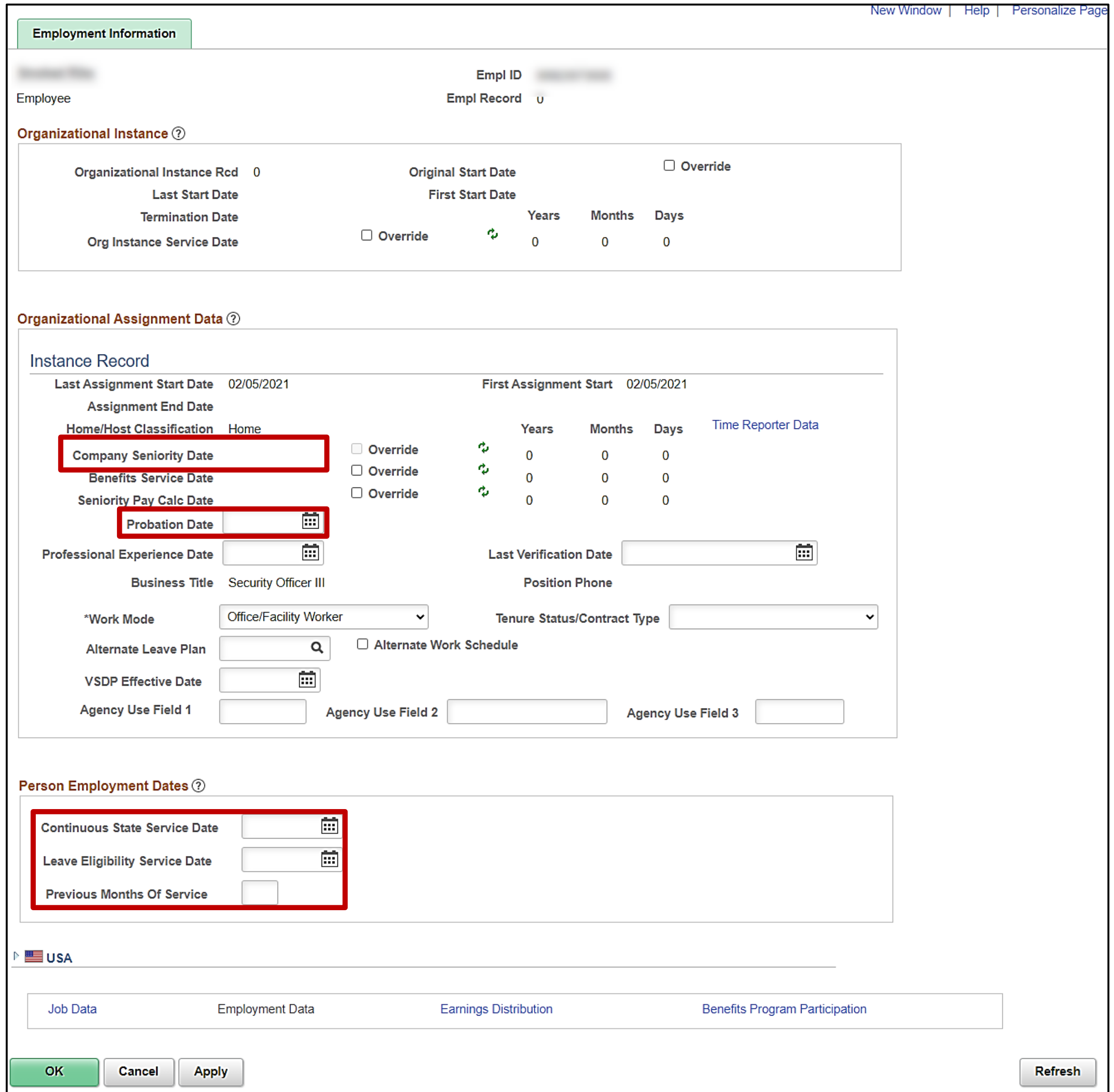
Wage employee – The Person Employment Dates box does not populate.



Hiring or Rehiring an Employee (continued)

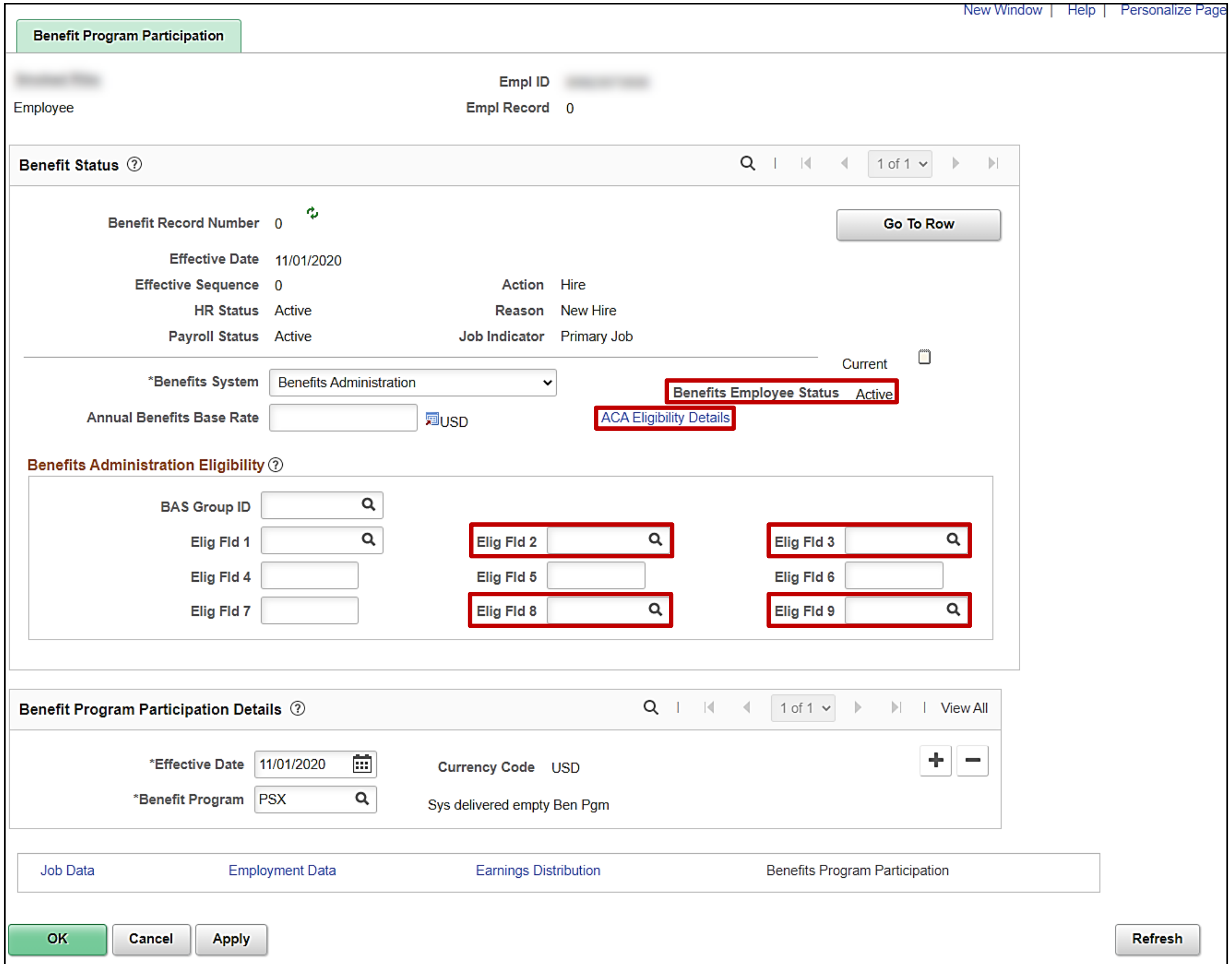
Job Data – Employment Data

Salaried employee – The Person Employment Date box populates – HR Admin updates.



Hiring or Rehiring an Employee (continued)

Job Data Information – Benefits Program Participation



Hiring or Rehiring an Employee (continued)

Navigation: Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

Hiring or Rehiring an Employee (continued)

The chart below outlines the criteria for using the three possible data entry methods.

	Online Entry	Mass Upload	Interface
Data Source	Entered by user	User-populated Excel template loaded by agencies, SPO, or PPS (as applicable)	System to system
Data Volume	Low to moderate volume	High volume	High volume
Frequency	Ad-hoc, Still adhere to payroll calendar	Ad-hoc, infrequent, Still adhere to payroll calendar	Ongoing, through scheduled batch processing
Data Validation	Invokes all online edits and validations	Invokes all online edits and validations	Invokes all online edits and validations
Error Handling	Data errors are addressed during real-time data entry	Rudimentary error reporting by row number only. Errors must be manually keyed into Cardinal or fixed in Excel and reloaded	Detailed errors are listed in error report and must be fixed in the source system or manually keyed into Cardinal

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. The Agency HR enters the following information on the Personal Data for the new Employee
   a) SSN, birth date, name, business email address
   b) Position and Job information
   c) Compensation

2. The Agency HR enters the following information on the Job Data for the new Employee
   a) SSN, birth date, name, business address
   b) Position, Job information, Compensation
   c) Payroll Paysheet

3. True or False. The Agency HR uses a New Hire Checklist to guide them through the new hire process.

DEMO

Hands-On Exercise

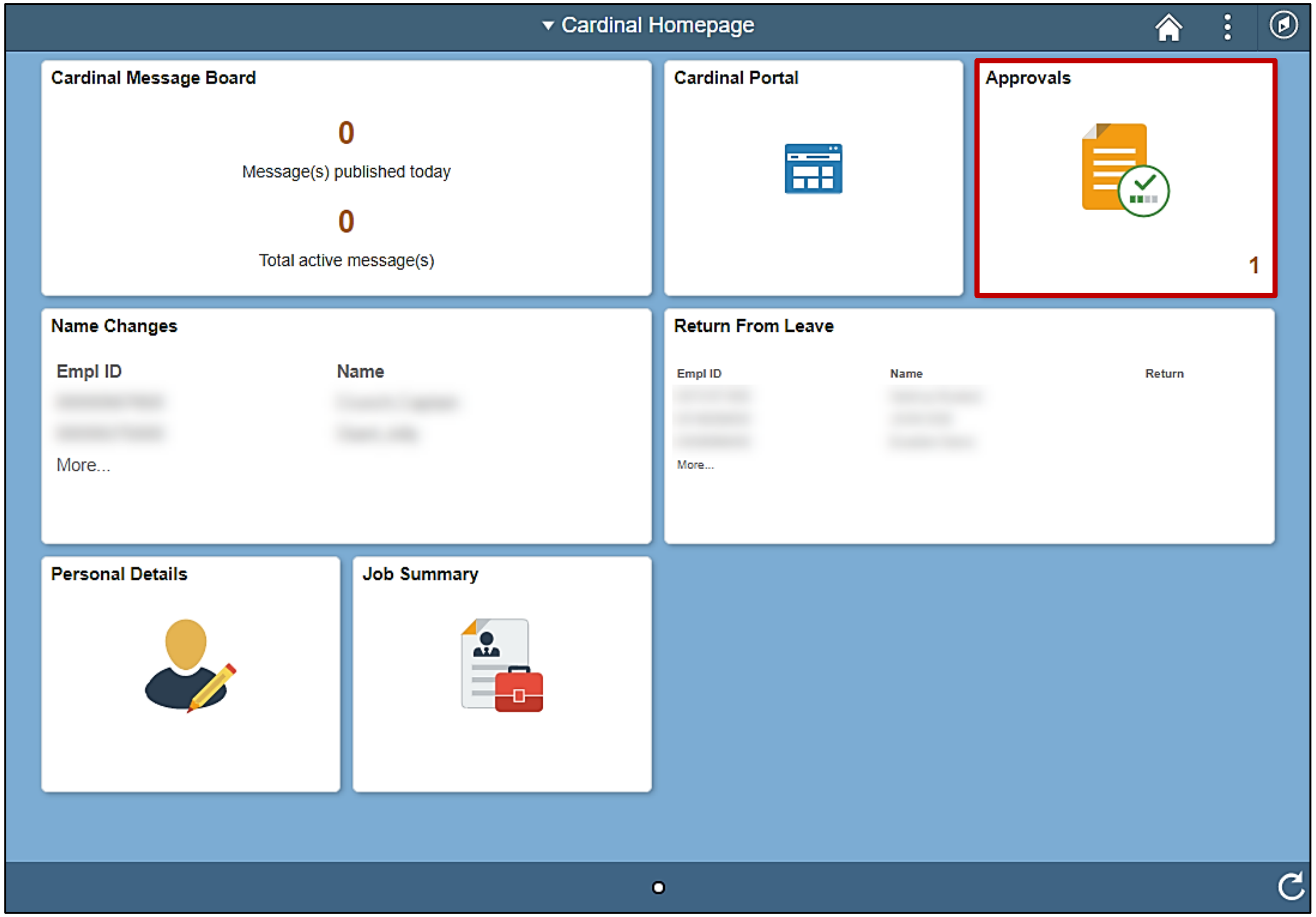
Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Approving Employee Self Service Transactions

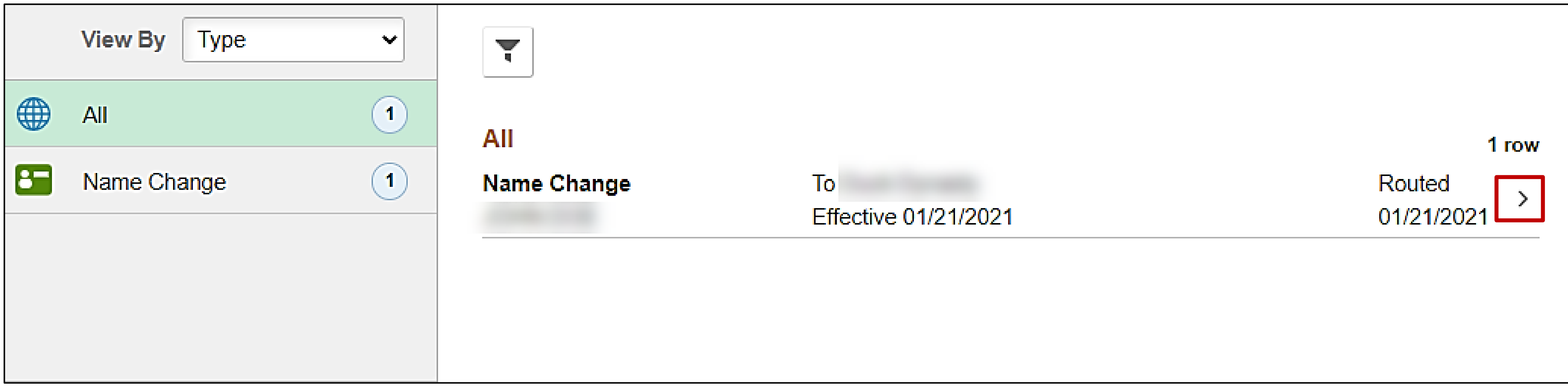
After reviewing required name change documentation the Agency HR Administrator navigates to the **Approvals** page to approve or deny submitted name changes.



<u>Navigation:</u> Cardinal Homepage > Approvals Tile

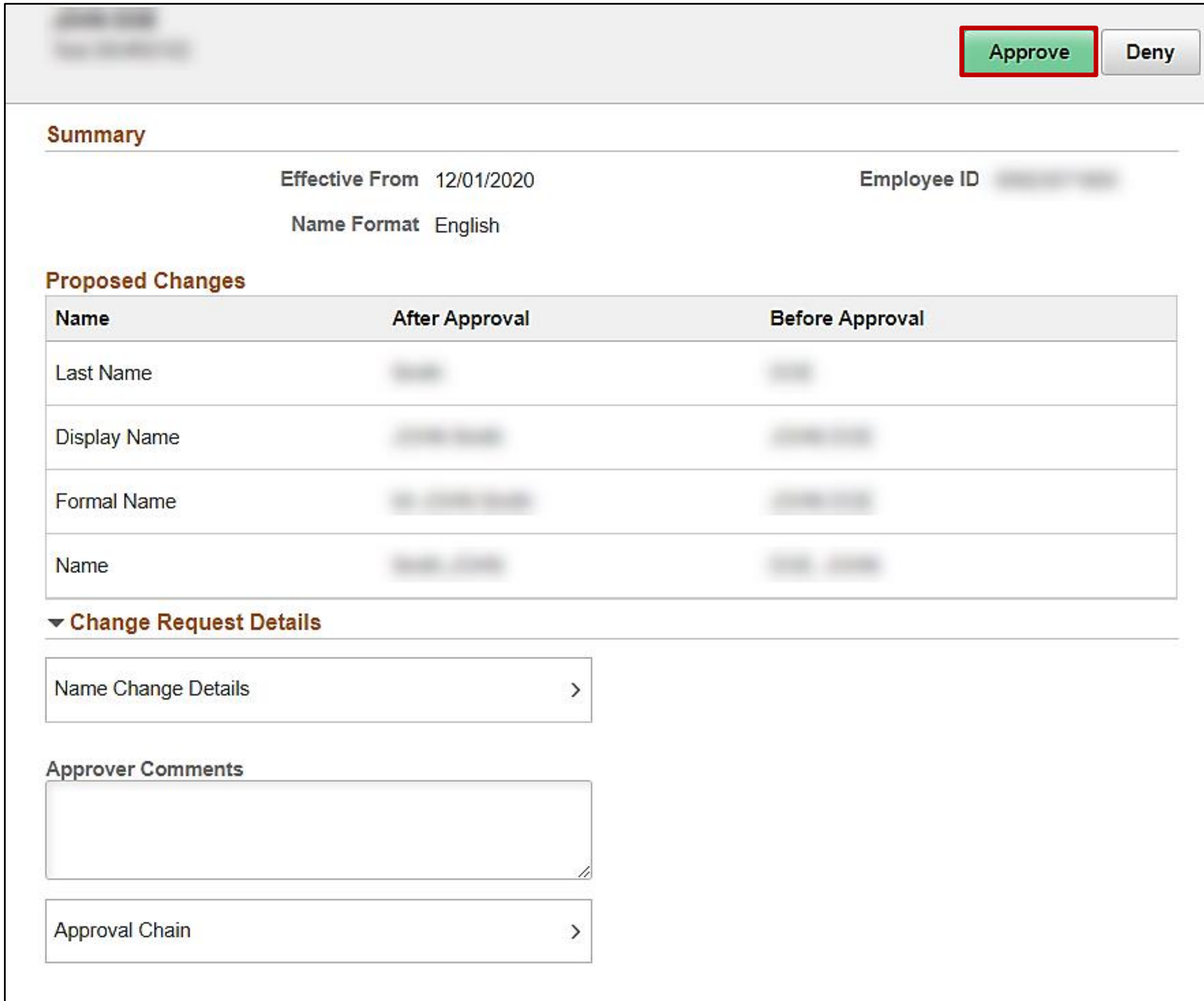
Approving Employee Self Service Transactions (continued)

Agency HR Pending Approval listing



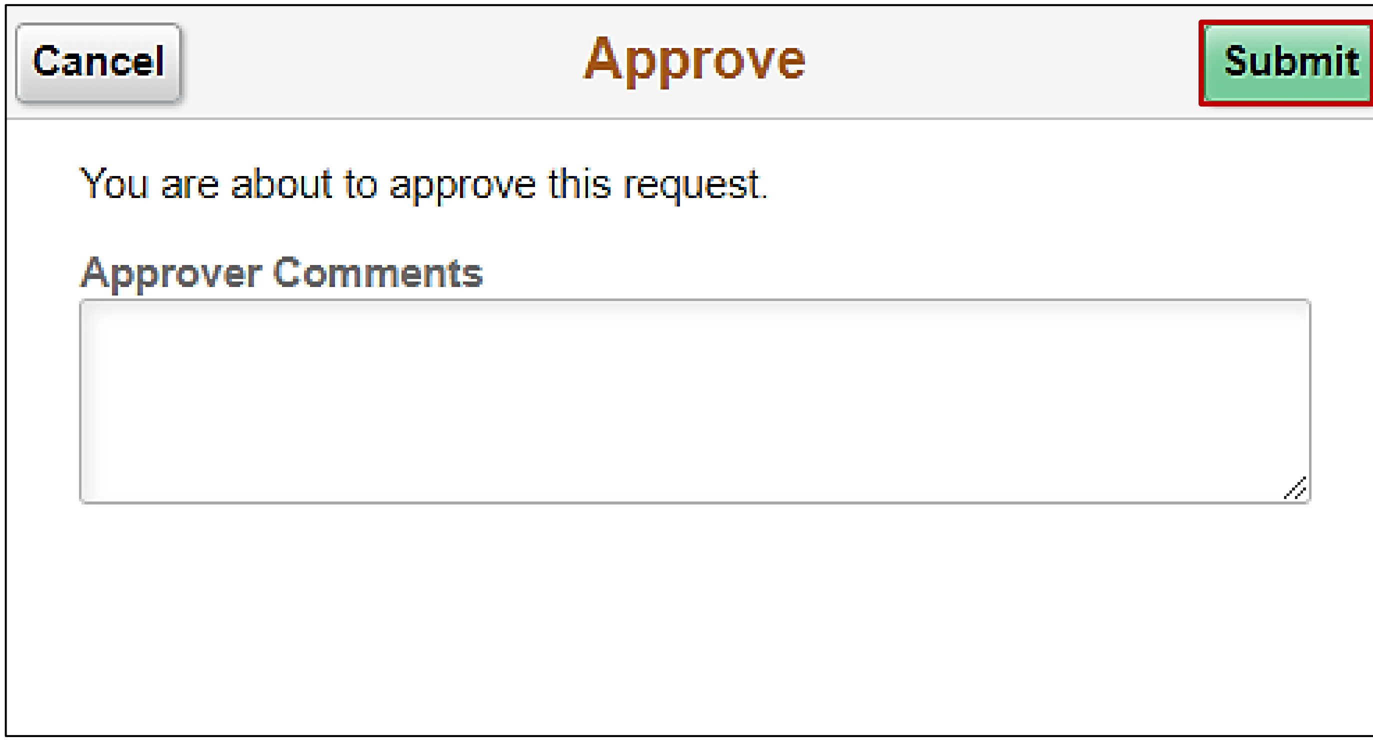
Approving Employee Self Service Transactions (continued)

Specific Name Change submission



Approving Employee Self Service Transactions (continued)

Agency HR Submit Approval



Approving Employee Self Service Transactions (continued)

Agency HR saved approved transaction

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Intra-Agency Transfer

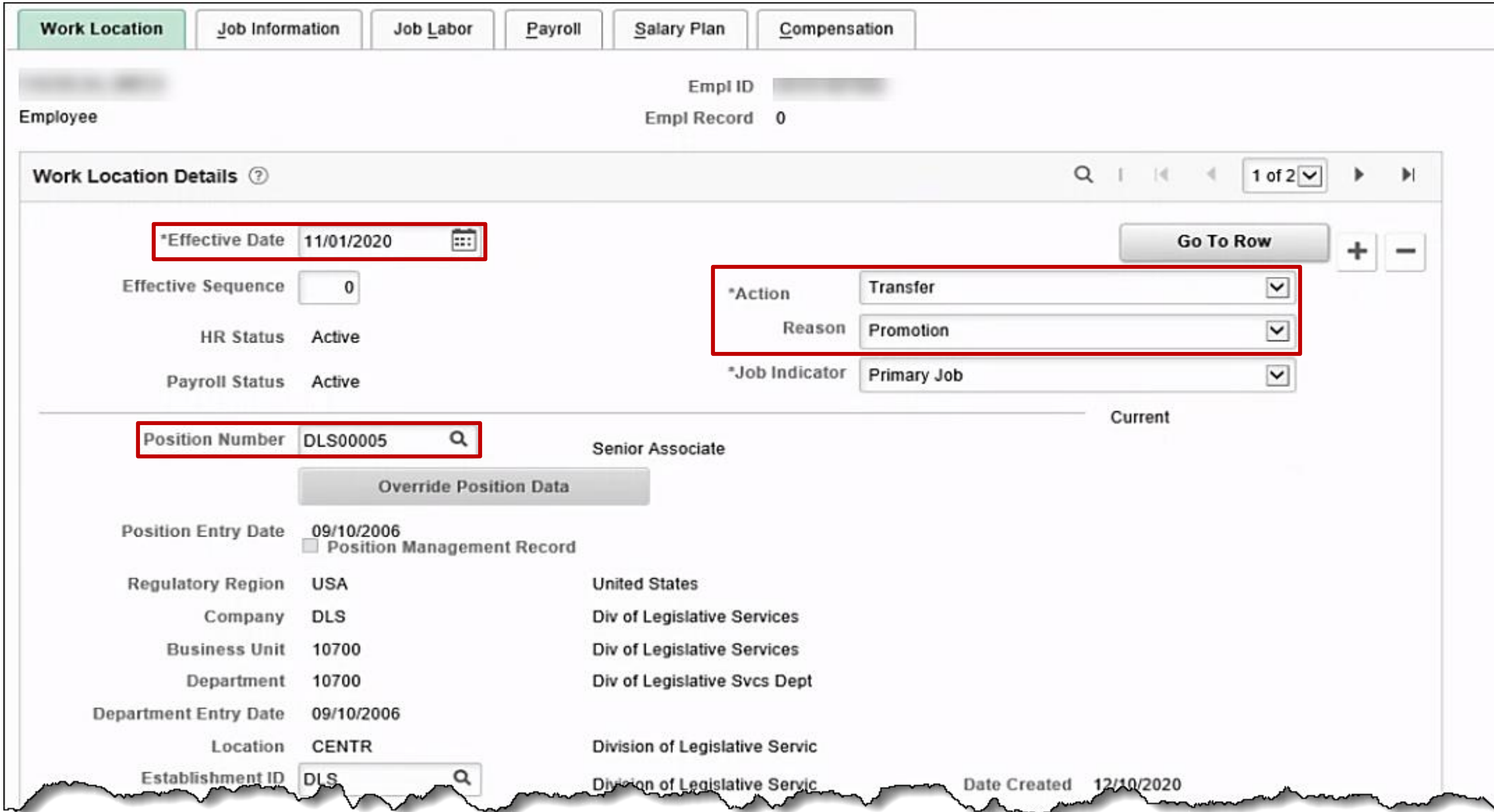
- Movement of employee from one position to another within the same Agency
- Agency HR updates employee's **Job Data** page and all applicable data fields (e.g., compensation)
- **Action** and **Action Reason** fields maintain active HR and Payroll Statuses
- When completing a change from a wage position to another wage position it is no longer necessary to terminate the wage/hourly employee and rehire them into a new wage/hourly position. To complete this type of transaction HR Admin will simply insert a row and select Action of Transfer and the applicable Reason. Use the Configuration Workbook to determine the appropriate Reason
- If moving an employee from a Salary position to a Wage position or a Wage position to a Salary position, the Action/Reason for the movement **out** of the position is **Termination/Resignation**
- If moving an employee from a Salary position to a Wage or a Wage position to a Salary position, the Action/Reason for the movement **into** the new position is **Hire/New Hire**. This movement requires the agency to add a new employee instance (employee record) during the Hire process

Be mindful that the Benefits Administrator will need to re-elect benefit elections of the employee once the transfer process to the receiving agency is complete. See Job Aid titled **361 Benefits Quick Reference Guide** for more details. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For detailed information on Intra-Agency Transfers, see the Job Aid titled **HR351 Intra-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Intra-Agency Transfer (continued)

Navigation: Navigator > Workforce Administration > Job Information > Job Data



Updating Employee Compensation

- Employee Job Record Pay Components:
  - State salary
  - Non-state salary
  - Special pay SPPAY Special Rate Compensation
  - Hourly rate

- Compensation parameters (i.e., Pay Bands) only overridden by DHRM
  - Errors if pay rate exceeds limits
  - Discipline pay rate changes at least 5%

- Submit mass uploads (e.g., Agency-wide compensation actions) to PPS for uploads

- Bonuses not tracked/paid through Employee Job Record (covered later in course)

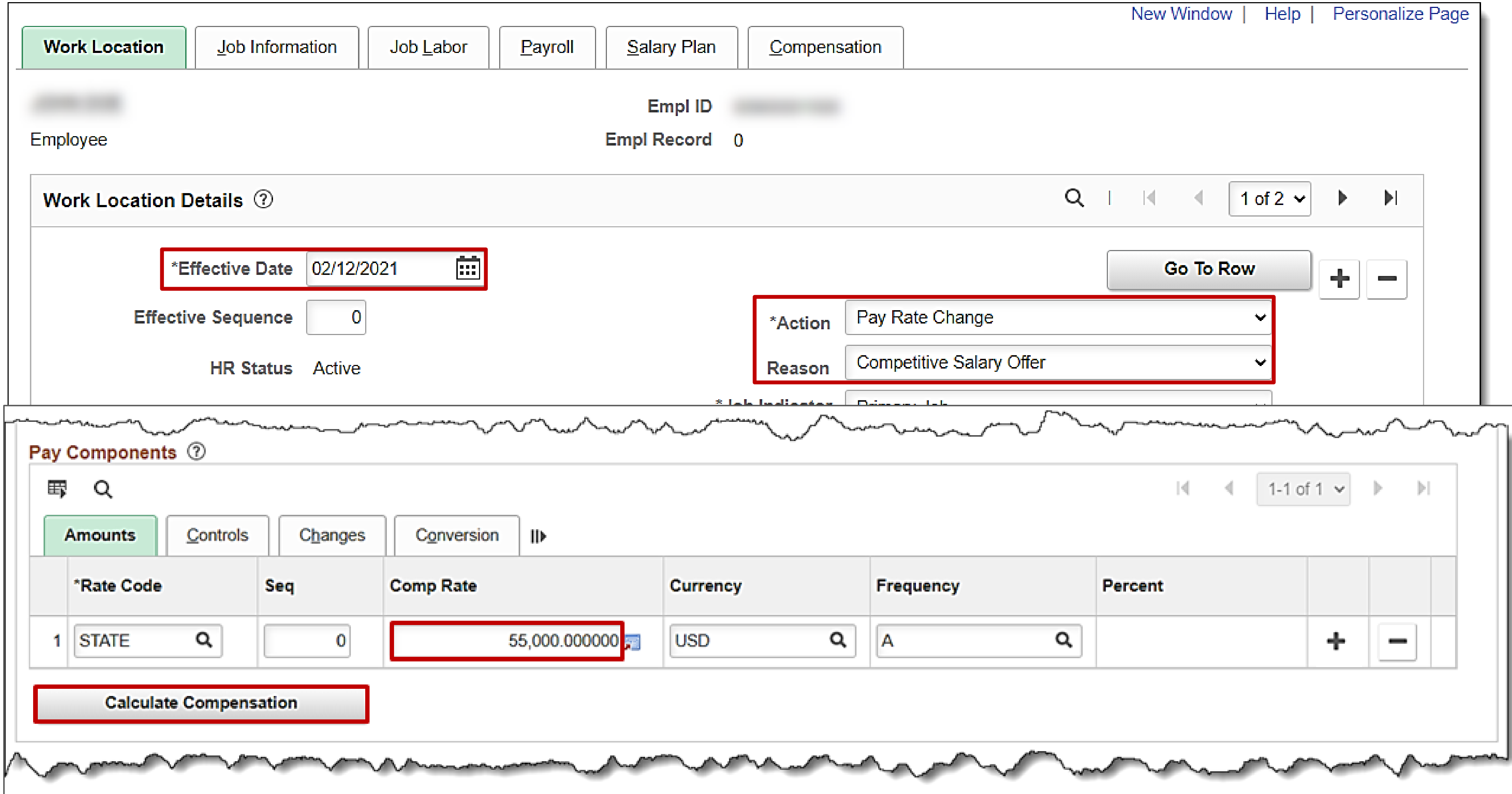
- Payroll Administrator runs reports and queries for reconciliation process

For further details on Employee Compensation Changes, see the Job Aid titled **HR351 How to Change/Update Employee Compensation**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on Rewards and Recognitions, see the Job Aid titled **HR351 Rewards and Recognitions**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on how to complete a mass upload see the Job Aid titled **HR351 Mass Update**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Updating Employee Compensation (continued)



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Intra-Agency Transfer refers to the movement of an employee from one position to another within the same agency.
   True or False.

2. Additional job data (e.g., compensation) fields are updated, as applicable.
   True or False.

3. If moving an employee from a Salary position to a Wage position the Action/Reason for the movement **out** of the position is **Termination/Resignation**.
   True or False.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Inter-Agency Transfer

An Inter-Agency Transfer is defined as the movement of an employee from one Agency to another Agency.

Verify that all necessary data is in hand prior to moving forward with keying the transfer transaction. Agency HR will verify that the correct position number is known and that the position includes the correct job code, title, and location code. The position will default the applicable salary plan and grade.

Agency HR updates the employee's job data.

The sending and receiving agencies coordinate the effective date of the termination (sending) and the effective date of the hire (receiving). The Action/Reasons "**Transfer Out**" and "**Transfer In**" ensure the employee maintains an active Benefits Status.

The receiving agency adds a new employee instance (employee record) during the Hiring process. If the employee is returning to an agency, use the employee's original employee record from that agency during rehire transaction.

The Action/Reason of "Transfer In" reactivates the employee's HR and Payroll Status after they are terminated by the sending agency. The coordinated effective date ensures the employee does not experience a break in service.

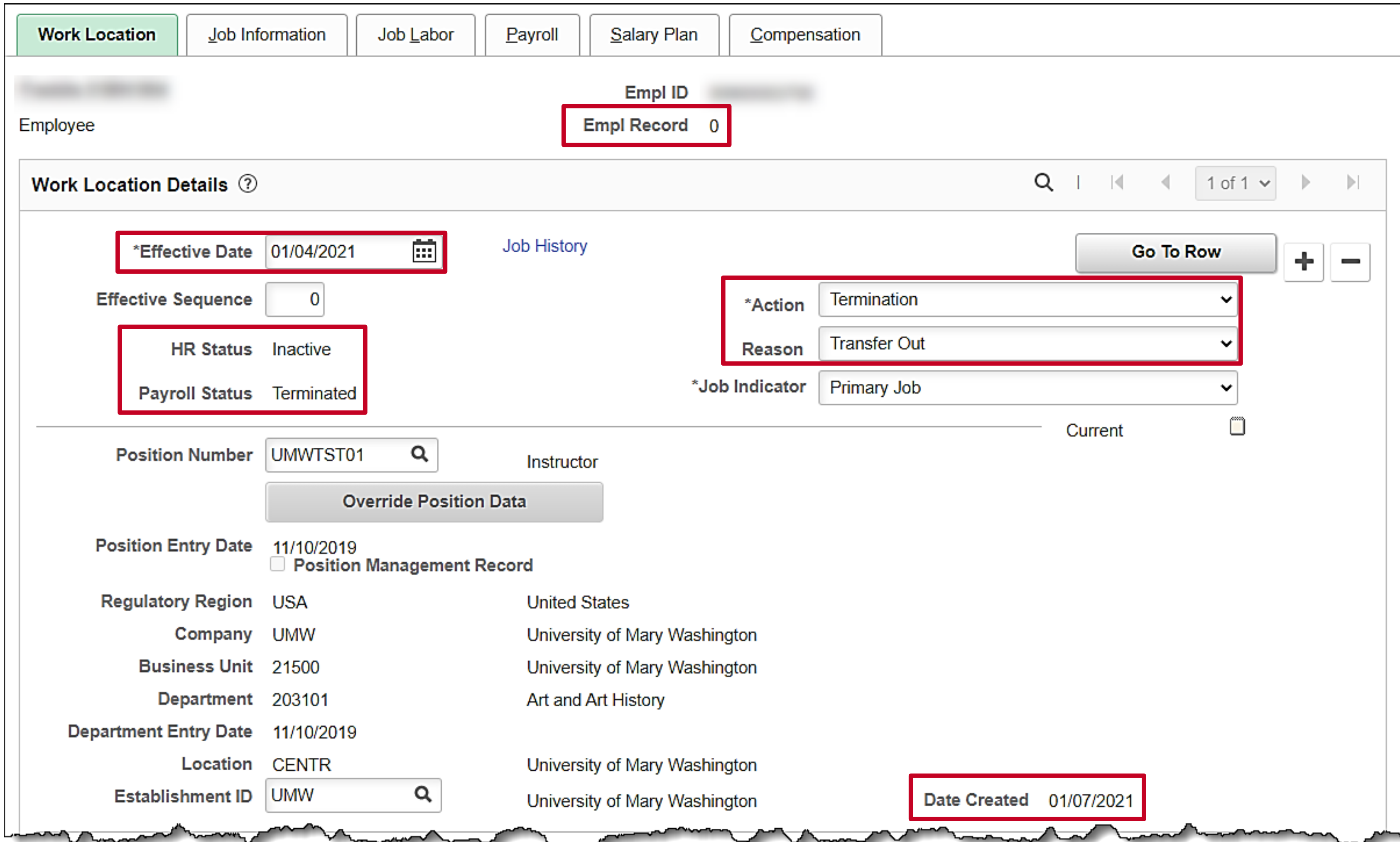
The transfer to the new agency **must** be entered by the receiving Agency HR Administrator the day after or later than the sending agency enters the termination so that the Vendor receives a termination from the sending agency AND an election in the receiving agency. Enter Effective Date = Same as Transfer Out date.

Update additional job data (e.g., compensation) information, as applicable.

Be mindful that the Benefits Administrator will need to re-elect benefit elections of the employee once the transfer process to the receiving agency is complete. See Job Aid titled **361 Benefits Quick Reference Guide** for more details. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Inter-Agency Transfer (continued)

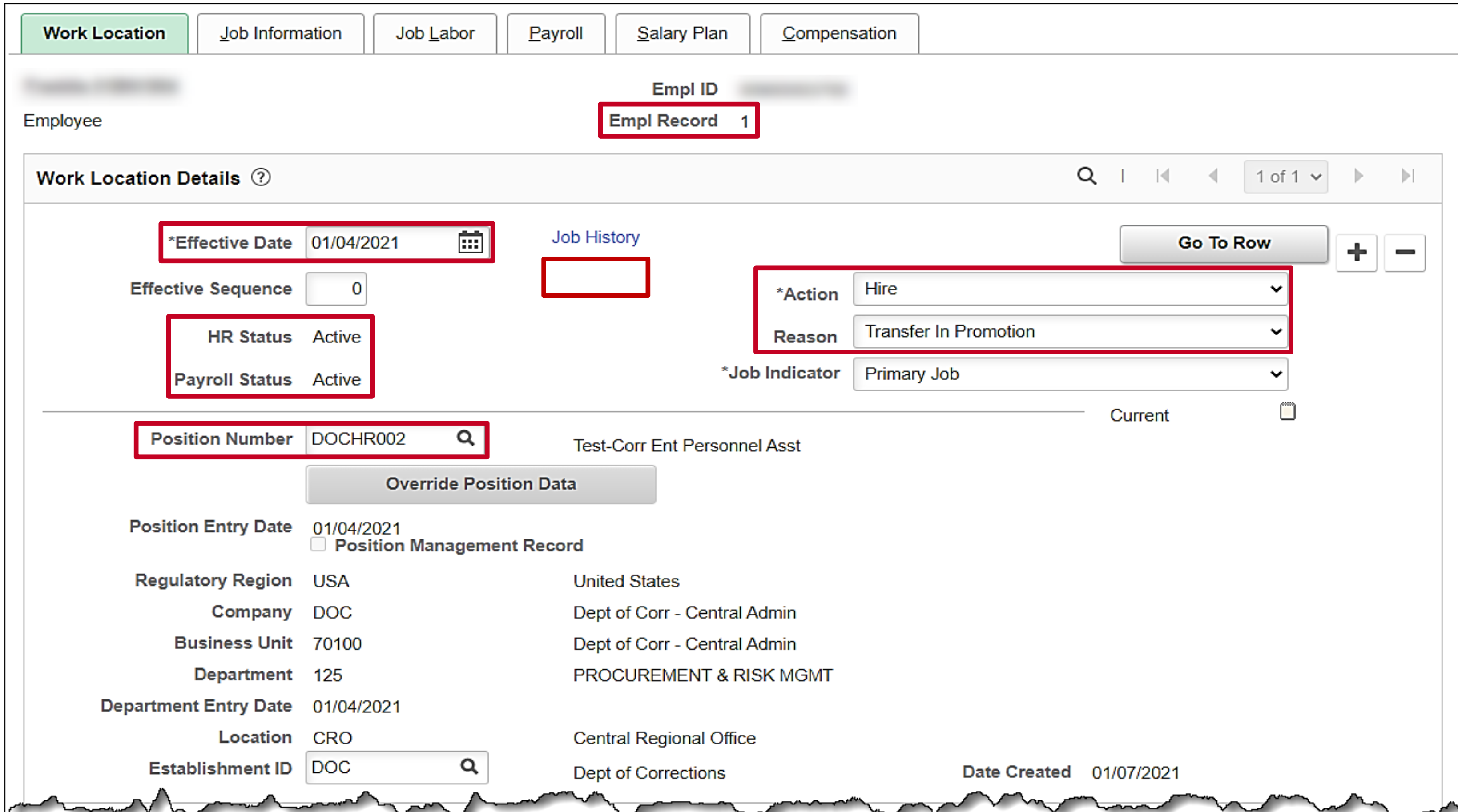
The Sending Agency selects “Termination” from the **Action** field drop-down menu and “Transfer Out” from the **Reason** field drop-down menu.



Navigation: **Navigator > Workforce Administration > Job Information > Job Data**

Inter-Agency Transfer (continued)

The Receiving Agency selects “**Hire**” from the **Action** field drop-down menu and “**Transfer In**” from the **Reason** field drop-down menu.

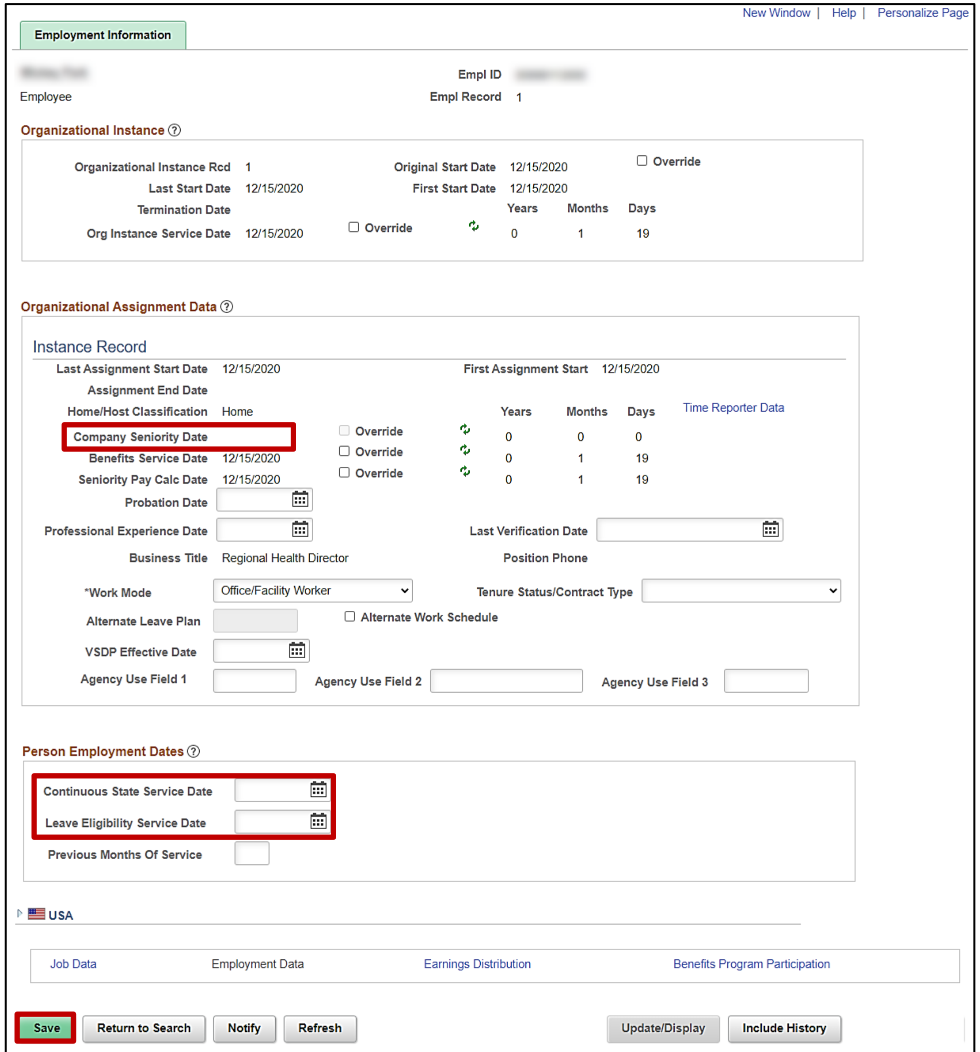


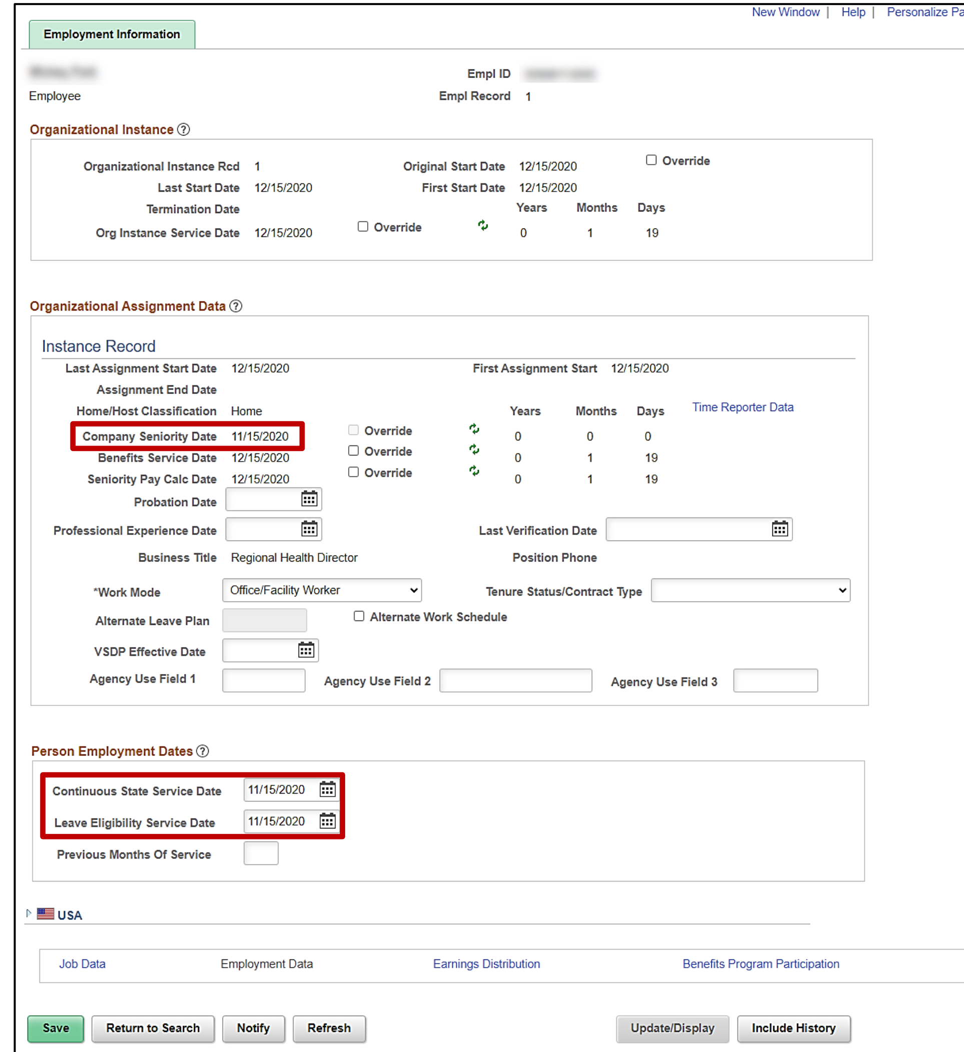
<u>Navigation</u>: Navigator > Workforce Administration > Job Information > Job Data

For further information on Inter-Agency Transfers, see the Job Aid titled **HR351 Inter-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Inter-Agency Transfer (continued)

The Receiving Agency manually updates the employee's **Leave Service Eligibility Date** and **Continuous State Service Date** fields, which populate the **Company Seniority Date** field.





__Navigation__: **Navigator > Workforce Administration > Job Information > Job Data**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. Inter-Agency Transfer refers to the movement of an employee from one Agency to another Agency.

2. True or False. The Action/Action Reason the receiving agency uses maintains an active HR Status and an active Payroll Status (if applicable).

3. True or False. The employee stays in the same position when an Inter-Agency Transfer is completed.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Maintain Leave Status (Paid and Unpaid)

- Place **SALARIED** employees in paid or unpaid leave status
  - Hourly employees generally not eligible for leave

- Keyed manually or loaded via Mass Upload Process

- Continue to examine change in status and work with employee to complete documentation

- Within Cardinal:
  - Link the employee to the Leave of Absence Checklist
  - Add a row to change the employee's status to Leave of Absence
  - Add a row to update the pay group to non-paying effective the first day of the following pay period
  - If needed, add a row to extend the employee's expected return date
  - Add a row to return the employee from leave
  - Add a row to update the pay group to original the pay group effective the first day of the following pay period

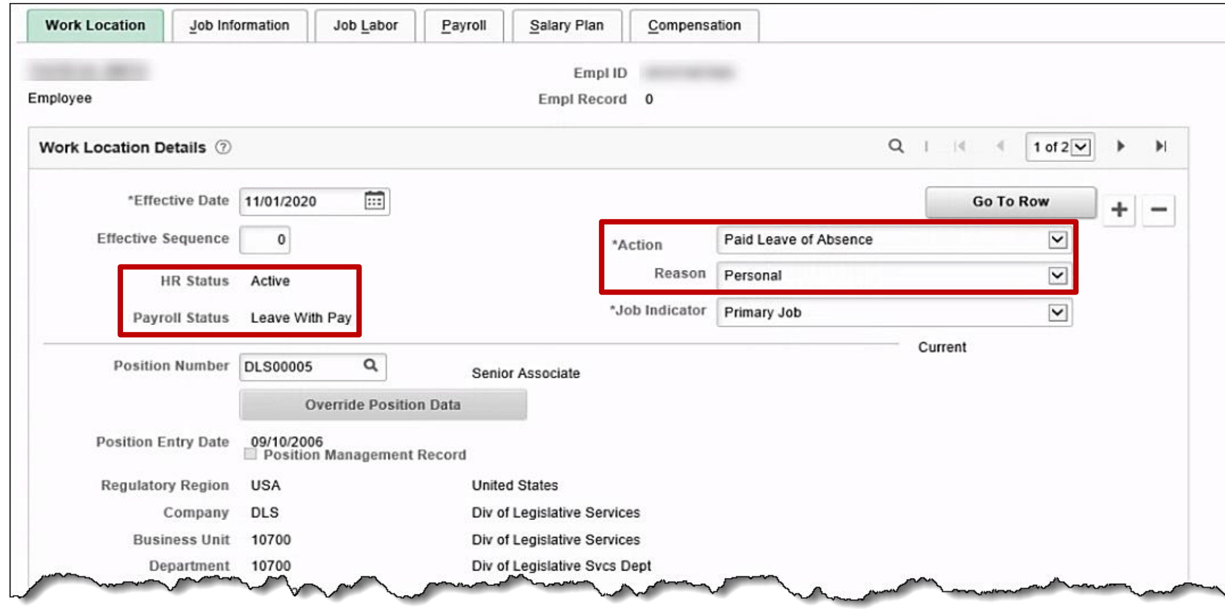
- Use Job Record Notepad to capture non-confidential comments or further explain transactions

For further information on Managing Leaves of Absence, see the Job Aid titled **HR351 Managing Leave of Absence**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

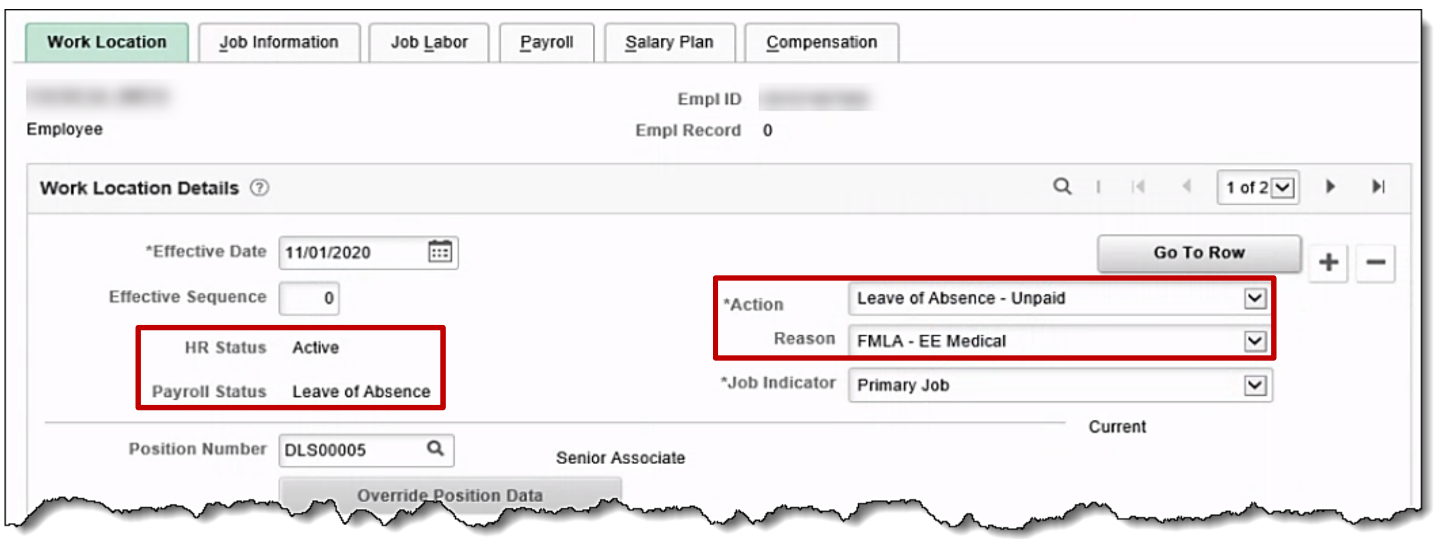
For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Maintain Leave Status (continued)

Leave of Absence (Paid)



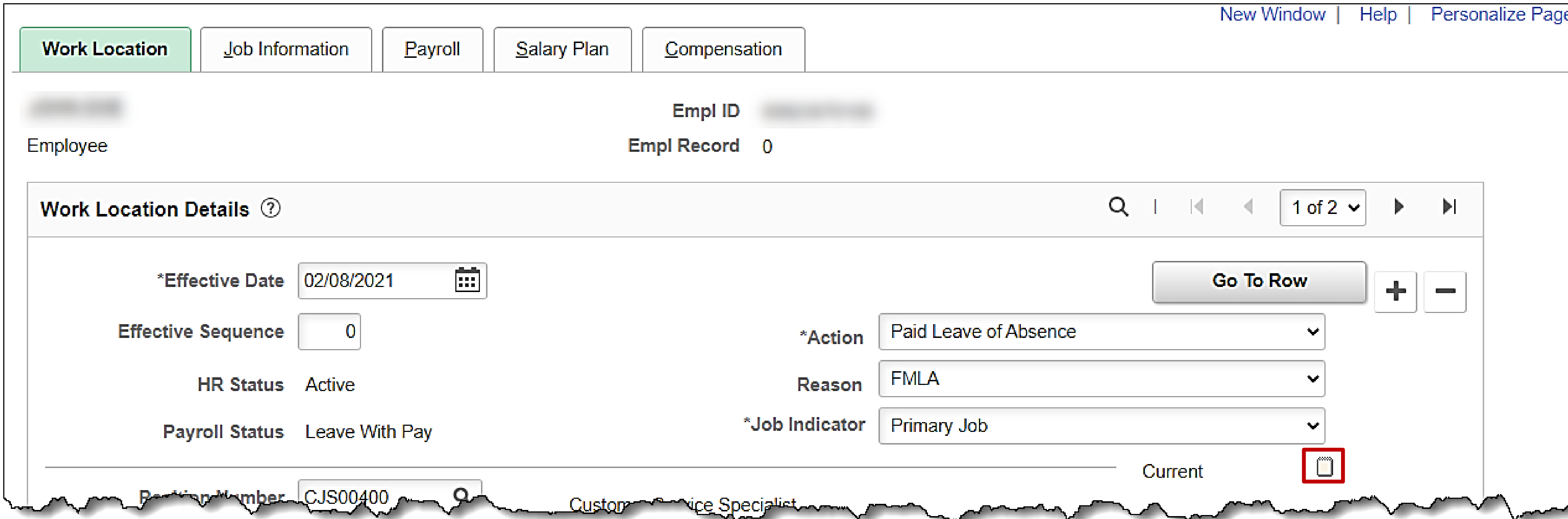
Leave of Absence (Unpaid)



Navigation: Navigator > Workforce Administration > Job Information > Job Data

Maintain Leave Status (continued)

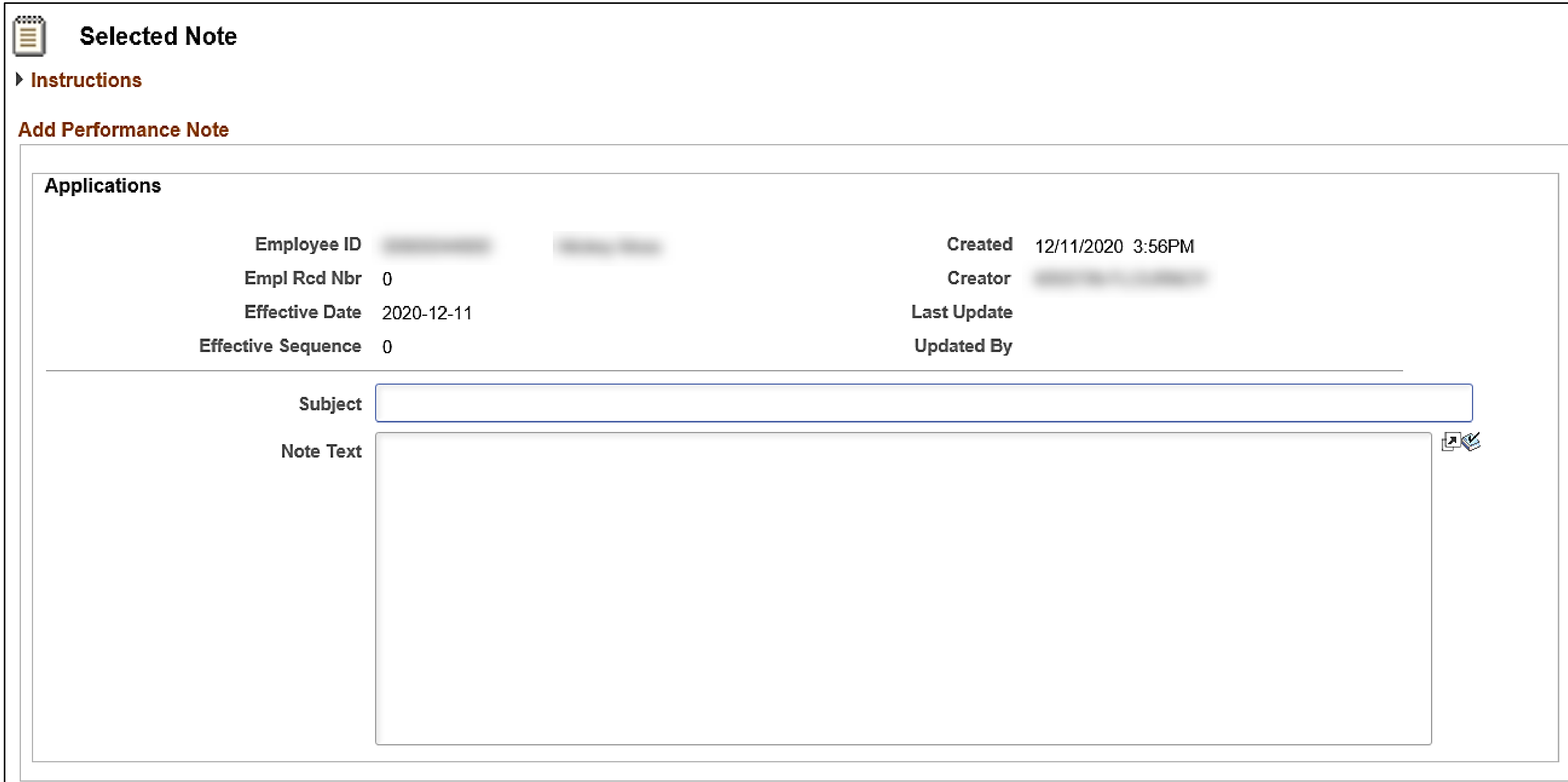
Example of Notepad functionality - Use as you would have used it on the PMIS screen.



Navigation: **Navigator > Workforce Administration > Job Information > Job Data**

Maintain Leave Status (continued)

Notepad functionality



<u>Navigation</u>: **Navigator > Workforce Administration > Job Information > Job Data**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. The Agency HR uses the Notepad functionality to document other non-confidential Leave Status information.

2. True or False. The Agency HR is required to insert a row on the Job Record to place the employee on Leave.

3. True or False. The Agency HR is required to insert a row to return the employee from Leave of Absence.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Separate Employee

Types of **Separations** covered in this section of the course:

Involuntary

- Termination is an employee's involuntary termination from state service. Examples include Layoff, Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties

Voluntary

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation.

After the Termination transaction is saved, all HCM functional areas are updated appropriately:

- Benefits status is updated in Cardinal Benefits (BN); COBRA eligibility is triggered if applicable

- Time Reporter is updated for Cardinal TA. Productive and non-productive time can still be entered and approved prior to the effective date of the Layoff. The updated HR status stops leave accruals

- The updated Payroll status does not create a Paysheet for the employee

Separate Employee (continued)

- Effective date of Termination transactions is generally the day immediately following last day worked
  - Example: If employee last worked on Friday, Termination Effective Date is Saturday
- Link employee to Termination Checklist to guide through the termination process
- Update email address in Personal Data to the employee's personal email address and mark it as Preferred
- The employee email address must be updated in Cardinal after separation in order for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency Provided to Employee Provided. Agency HR must also check the personal email address as Preferred. Selecting this email address as preferred is the driving factor for post-employment system access. Separated employees will then have access to Cardinal for 18 months after the Termination Date. After 18 months, this access ends automatically. Agency HR does not need to go back in and remove the personal email address

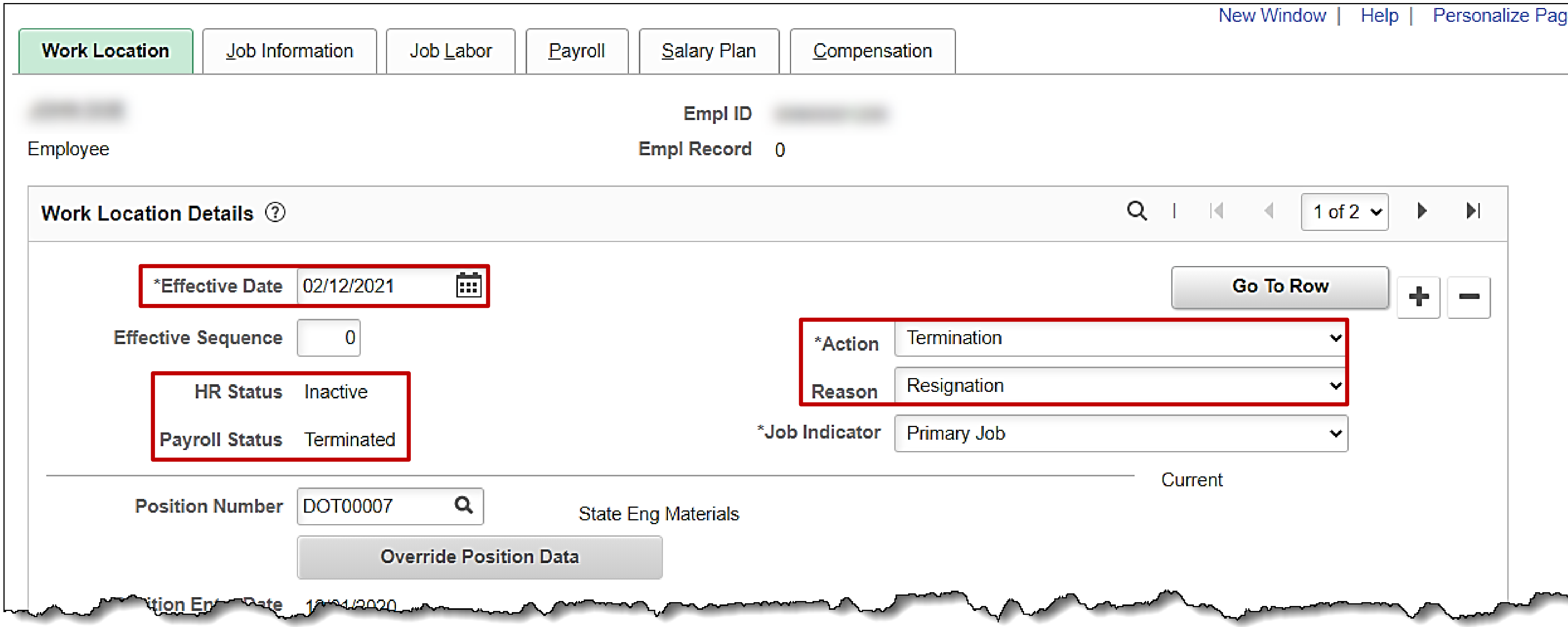
When terminating an employee, the Agency BA will need to process the termination of benefit elections for the Terminated employee. See **Job BN361 Quick Reference Guide** section **Processing Benefit Elections: Transfer Out / Termination Employees** for more details. This job aid is located on the Cardinal website in **Job Aids** under **Learning**.

For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Separating Employees, see the Job Aid titled **HR351 Separation Statues**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Separate Employee (continued)



<u>Navigation</u>: Navigator > Workforce Administration > Job Information > Job Data

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. Examples of Involuntary Termination include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.

2. True or False. Examples of Voluntary Termination include Resignation, Retirement, and Death.

3. True or False. The effective date of a termination is the day after the last day worked.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Mass HR Data Maintenance

- Agencies load large volumes of data to Cardinal using Excel-based mass upload tool
  - Lacks detailed error reporting capability, so use infrequently

The following list identifies entities responsible for running mass upload processes in Cardinal:

	Mass Upload Data Types	Loaded by Agency	Loaded by SPO	Loaded by PPS
	Position Data			X
	Postion Default Funding	X		
	Job Data			X
	New Hires			X
	Performance Ratings	X		
	Rewards and Recognition	X		
	Leave Balance Adjustments	X		
	Additional Pay	X		
	General Deductions		X	

Lesson Summary

3 Setup and Maintain Employee HR Data

In this lesson, you learned:

- How to create and maintain position data
- How to Hire/Rehire employee
- How to approve proposed employee self service actions (Changes to Marital Status, Name, Address)
- How to complete an Intra-Agency Transfer
- How to complete an Inter-Agency Transfer
- How to maintain employee leave status
- How to separate an employee

Lesson

4 Maintain Employee Additional Pay

This lesson covers the following topics:

- Maintaining Employee Additional Pay

Maintaining Employee Additional Pay

Additional pay processes the additional amount of pay that is to be added to the employee's paycheck per pay period.

- Fixed, Recurring Payments in addition to Regular Pay
  - Cell Phone Reimbursement
  - Adjunct Pay
  - Temporary Pay

- For Retroactive Effective Dates:
  - Payroll Admin calculates retroactive amount
  - Payroll Admin processes payment in SPOT

- For partial amounts due to Mid-Pay Period changes:
  - Effective Date is the actual date the additional pay became effective
  - Payroll Admin calculates prorated amount
  - Payroll Admin processes payment in SPOT

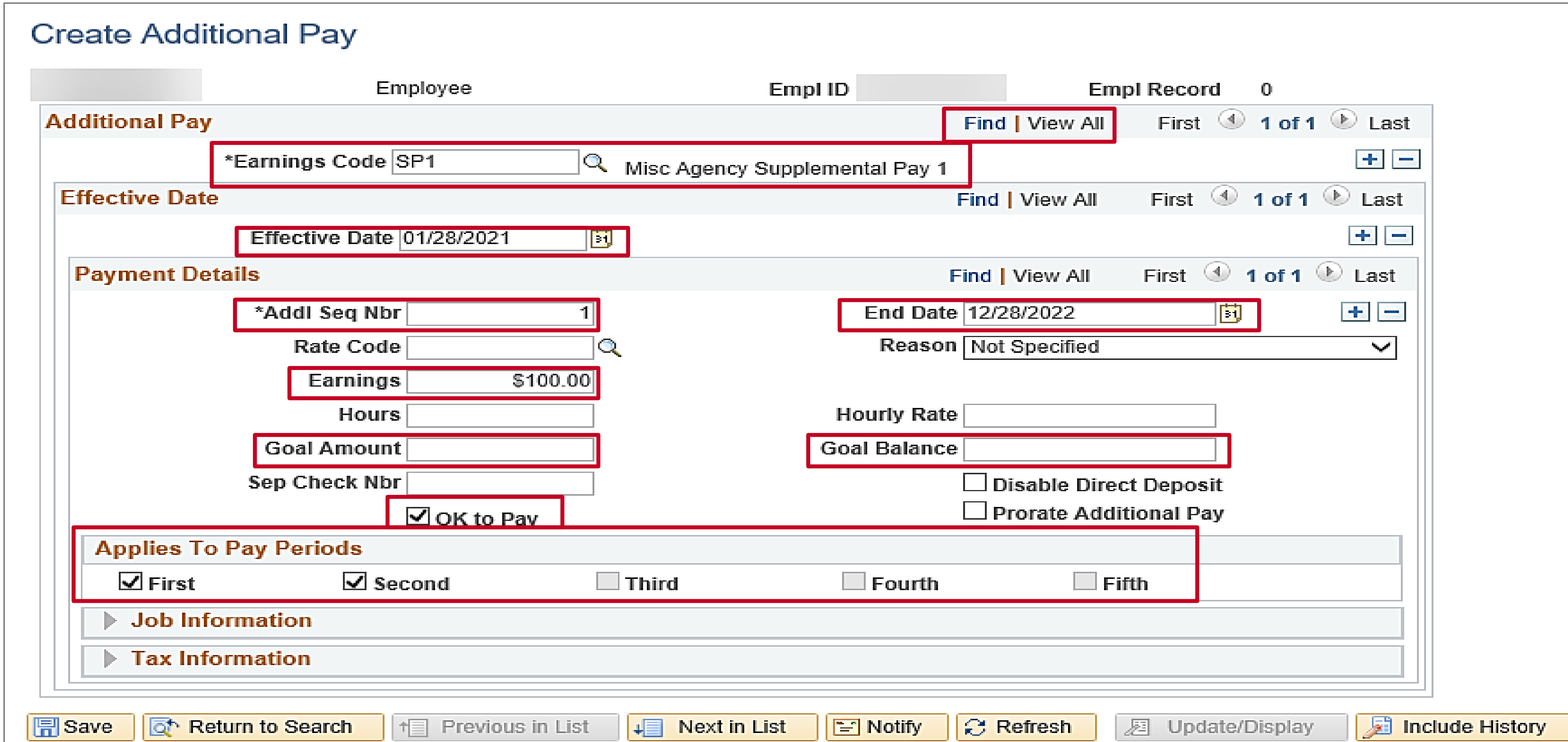
- Only HR enters Additional Pay transactions

For further information on SPOT payments, refer to the Job Aid titled **PY381 Using the Single-Use Payroll Online TOOL (SPOT)**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Additional Pay, see the Job Aid titled **HR351 Processing Additional Pays**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Maintaining Employee Additional Pay (continued)

Payroll Administrators verify the correct **Pay Periods** and the **OK to Pay** checkboxes are selected.



<u>Navigation:</u> Navigator > Payroll for North America > Employee Pay Data USA > Create Additional Pay

Additional Pay Earnings Codes

Typical Additional Pay Earnings Codes

Earn Code	Description	Add to Gross Income	Taxable	Notes
CAR	Reimb Use of Personal Car	Y	Y	
CCR	Company Car	N	Y	
MIL	Military Supplement	Y	Y	
MNT	Mobile Device Nontaxable	Y	N	
MTB	Mobile Device Taxable	Y	Y	
SEV	Severance Pay	Y	Y	
TMN	Temp Pay Non Paid Agys	N	N	
TMP	Temporary Pay	Y	Y	
TPD	Taxable Per Diem	Y	Y	
TTR	Taxable Tuition	Y	Y	
VRS	VRS Contribution Base	N	N	Loaded by Batch Program
PRW	Premium Reward	Y	Y	Loaded by Interface

<u>Navigation:</u> Navigator > Payroll for North America > Employee Pay Data USA > Create Additional Pay

Additional Pay Earnings Codes (continued)

Agency Specific Additional Pay Earnings (e.g. supplement for working conditions)

Earn Code	Description	Add to Gross Income	Taxable	Notes
TXB	Misc Agency Specific Pay	Y	Y	
SP1	Misc Agency Supplemental Pay 1	Y	Y	
SP2	Misc Agency Supplemental Pay 2	Y	Y	
SPA	Misc Agency Specific Pay Amt	Y	Y	
AGY	Misc Agency Specific Pay	Y	Y	

Typical Additional Pay Earings for Higher Education

Earn Code	Description	Add to Gross Income	Taxable	Notes
WSS	Work Study Student	Y	Y	
SSN	Student Stipend NonTaxable	Y	Y	
SST	Student Stipend Taxable	Y	Y	
FOT	Faculty Other Pay (Adjunt for Sala	Y	Y	
AJT	Adjunct Faculty	Y	Y	

Navigation: **Navigator > Payroll for North America > Employee Pay Data USA > Create Additional Pay**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. An employee receives base salary on the additional pay line.

2. Additional pay is added to an employee's paycheck to reflect:
   a) Temporary pay, military pay, adjunct pay, stipends
   b) Leave of absence, stipends
   c) Short term disability

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Lesson Summary

4 Maintain Employee Pay

In this lesson, you learned:

- How to Maintain Employee Additional Pay

Next Few Topics are for VPA Agencies only

Lesson

5

Maintain Additional HR Data (HR Level 1)

This lesson covers the following topics:

- Entering and Maintaining Disciplinary Actions
- Entering and Maintaining Performance Ratings
- Entering and Maintaining Rewards and Recognition

Entering and Maintaining Disciplinary Actions

Entering and Maintaining Disciplinary Actions Overview

The Cardinal Disciplinary Action pages are used to record and track written notices and disciplinary actions. In addition, when the disciplinary action results in a change to the employee's job classification or compensation, an update to the employee's Job Record is required to impact the HR and Payroll functional areas (e. g., demotions, reductions in pay, terminations). DHRM will allow agencies to delete written notices and the associated disciplinary actions from the disciplinary action pages vs. requiring DHRM intervention.

Written notices can only be entered for VPA employees. Cardinal will not allow the user to enter a written notice for a non-VPA employee.

The Agency HR Administrator enters the written notice, along with the related details, which include the date of the offense, the nature of the offense, and any relevant agency notes. The expiration date of the written notice will default based on the group level. No manual updates will be made to this field. Agency HR can view the written notices via the online page or by using custom reports and queries. If there is a reverse or update to the disciplinary action, Agency HR will have the ability to update as required.

However, DHRM involvement is still required to modify the employee's job data record and reverse the disciplinary action. This will require a PPS ticket to be created.

Agency HR Administrators will have display only access to Disciplinary Actions entered by other agencies for their active employees.

Entering and Maintaining Disciplinary Actions

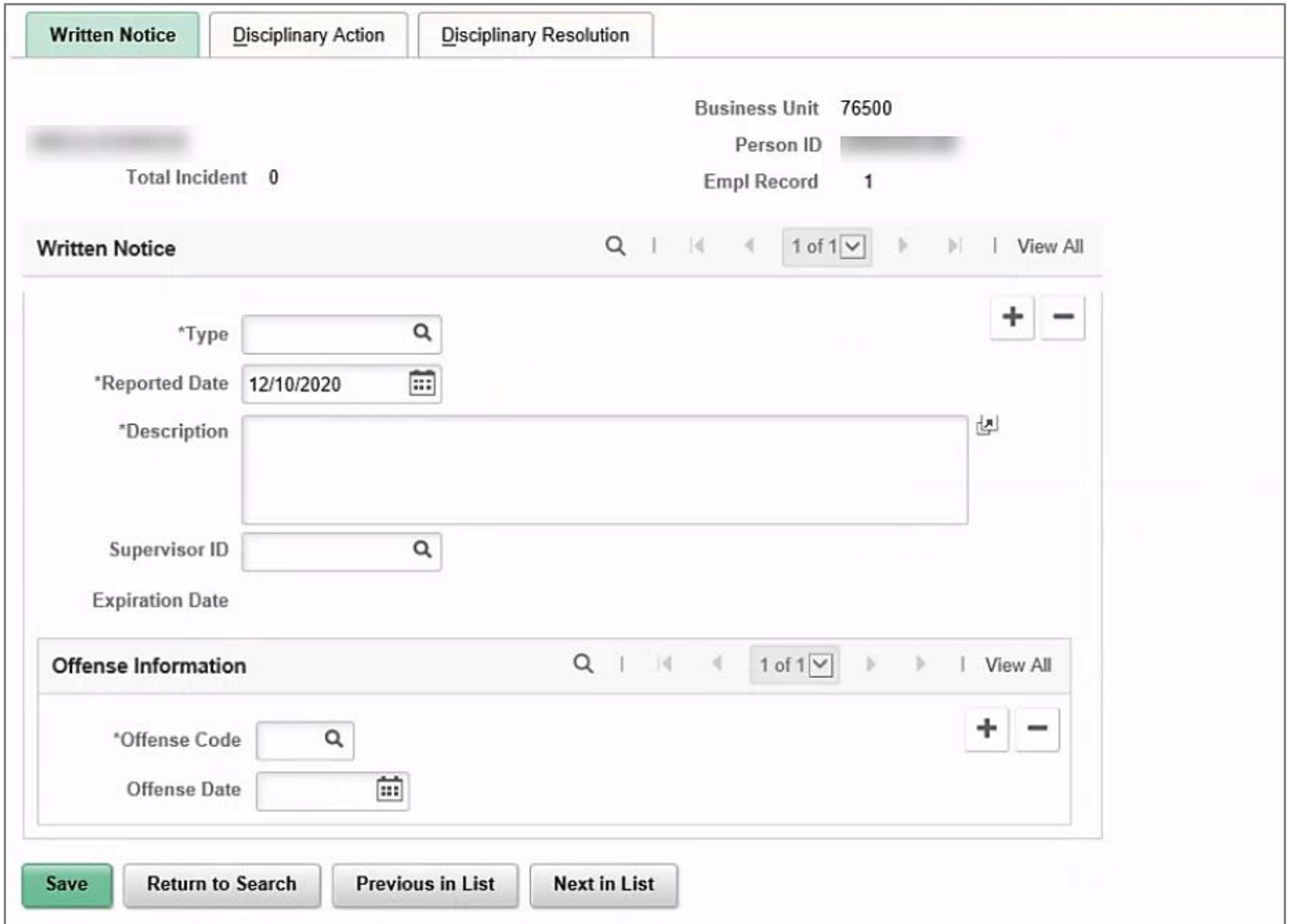
After a written notice has been entered, the agency will record the disciplinary actions associated with the written notice. The types of Disciplinary Actions include:

Disciplinary Lateral Transfer
Disciplinary Demotion
Disciplinary Pay Reduction (must accompany a Disciplinary Lateral Transfer and Demotion)
Suspension
Termination – Involuntary (Violation of Standards of Conduct)

For further information on completing a Disciplinary Actions, see the Job Aid titled **HR351 Entering and Maintaining Disciplinary Actions**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on employee salary reduction, see the Job Aid titled **HR351 Employee Compensation**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Disciplinary Actions



Navigation: Navigator > Workforce Administration > Labor Administration > Record Disciplinary Actions

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Entering and Maintaining Performance Rating

Performance Rating Overview

The Department of Human Resource Management (DHRM) maintains annual performance cycles and cycle effective dates. DHRM also communicates the applicable open/closed dates through normal business processes. Standard annual statewide employee performance management cycle is 12-month period from October 25 – October 24

Performance Ratings are annually collected and entered for all VPA employees.

- Four possible ratings:
  - X – Extraordinary Contributor
  - C – Contributor
  - B – Below Contributor
  - L – Employee on Leave or Otherwise Not Rated

During the annual performance rating cycle, Agency HR will now upload all ratings for their employees (X-Extraordinary, C-Contributor, B-Below Contributor, L- Employee on Leave or Not Rated).

- If rating is B – Below Contributor, enter planned re-evaluation date (no later than 90 days after evaluation)

- After re-evaluation, enter actual re-evaluation date and updated rating

- Initiate Separation as required

The Agency HR will also have the option to manually enter a rating for each employee directly into Cardinal via the Performance Rating page.

Entering and Maintaining Performance Rating (continued)

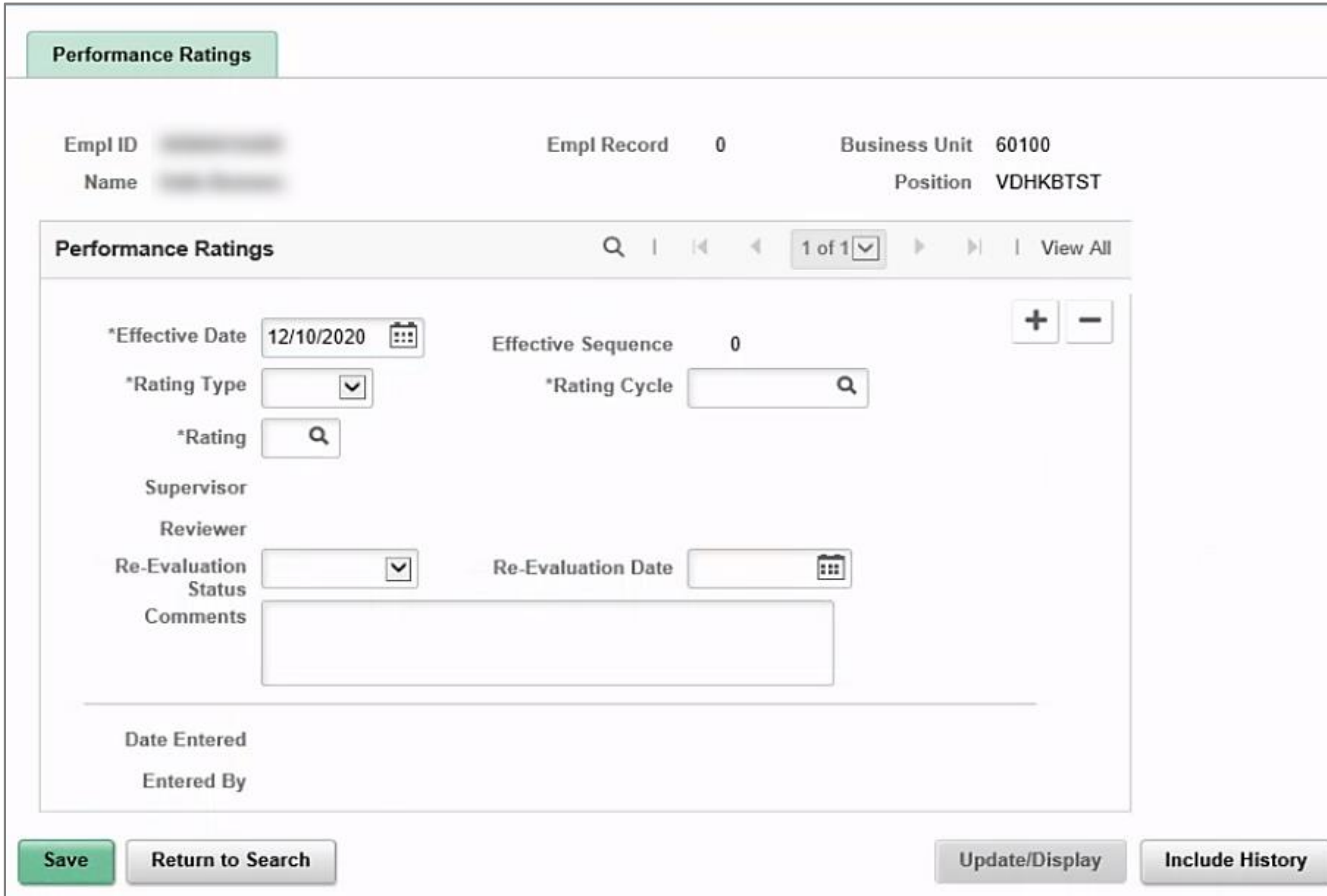
- If statewide compensation increase calls for certification of performance ratings, DHRM communicates Performance Certification (i.e., effective date the performance cycle)
- Performance ratings may factor in of pay adjustment decisions; maintain compliance with DHRM Performance Management Policy 1.40

For further information on Mass Uploads, see the Job Aid titled **HR351 Performance Ratings**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Mass Uploads, see the Job Aid titled **HR351 Mass Uploads**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Compensation Changes, see the Job Aid titled **HR351 How to Change/Update Employee Compensation**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Performance Rating (continued)



Navigation: Navigator > Workforce Development > Performance Management > Performance Rating

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Entering and Maintaining Rewards and Recognition

Agency HR runs by-agency Rewards and Recognition Report

- YTD totals by Employee and by Type (confirm/deny compliance)
- Includes both Leave and Monetary Awards

Consolidated reporting pulls leave awards from the Cardinal Leave Award page and Cardinal Absence Management to show statewide totals of leave awards. For further information on Reports, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources.**

Leave Reward

- Agencies **NOT** using Cardinal Absence Management
  - Enter Leave Award information through Cardinal **Rewards and Recognition** page
  - Also enter Leave Award hours in external leave system of record
  - Cardinal does not interface to external systems of record

- Agencies using Cardinal Absence Management
  - Enter Leave Awards as balance adjustments or entitlements in Cardinal Absence Management
  - Consolidated reporting pulls Leave Awards from **Rewards and Recognition** page and Cardinal Absence Management to show statewide totals

For further information on how to enter the balance adjusts into Cardinal, see the Job Aid titled **TA374 Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Rewards and Recognition

Monetary Bonus

- Agency HR tracks employee's:
  - Written Agreement
  - Expiration date of the Written Agreement per incentive bonus
  - Payment Installments (singular or multiple – as needed)

- Agency HR updates and submits Excel spreadsheet to Agency Payroll to load into the Single Use Payroll Online Tool (SPOT) for payment

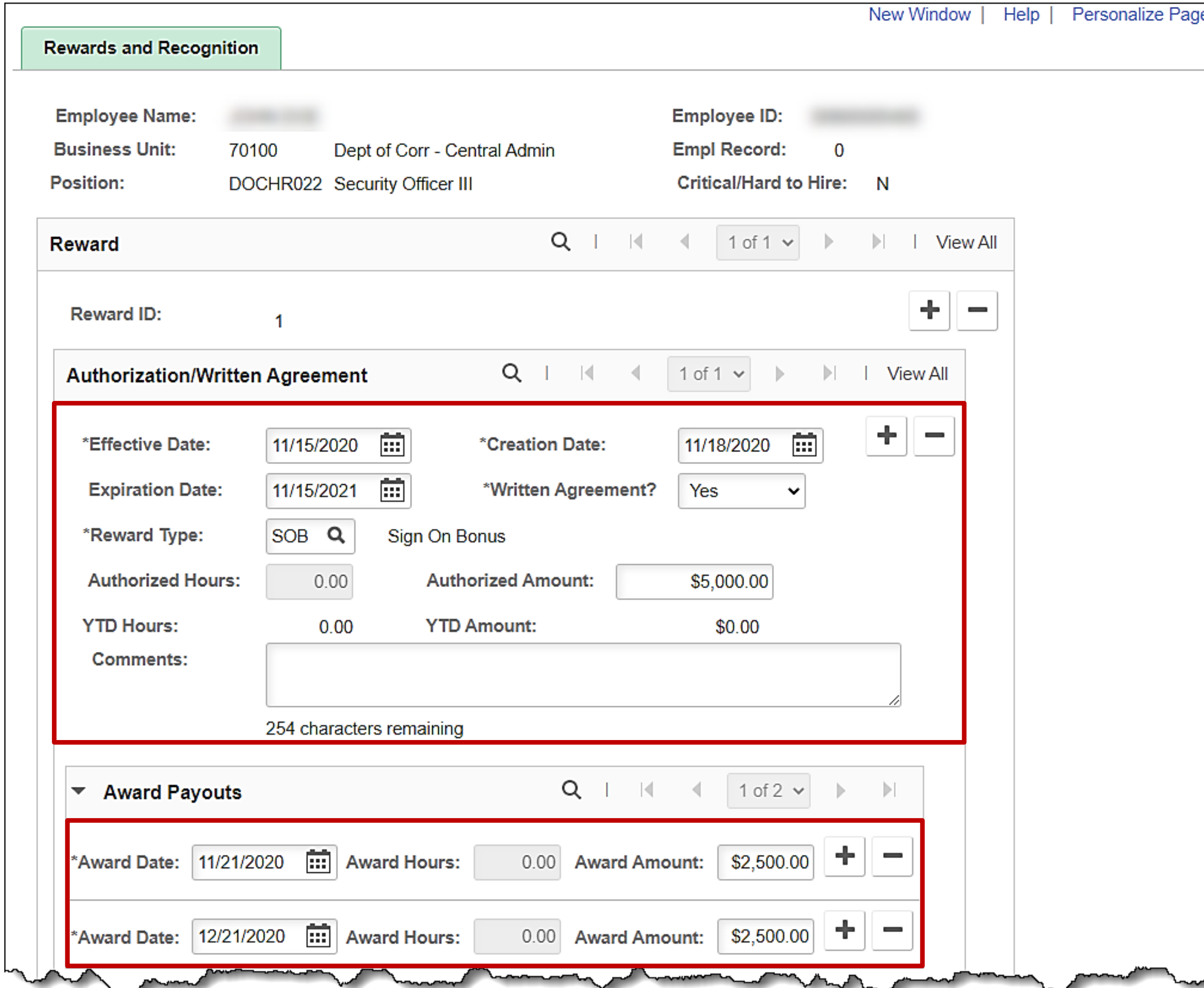
- For large volumes, optionally submit a file of rewards and recognition using the mass upload process

For further information on Rewards and Recognition see the Job Aid titled **HR351 Rewards and Recognition**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Rewards and Recognition

- Cardinal Rewards and Recognition tracks the following:
  - 529: Sign On/Retention 529 PMT
  - ALI: Annual Leave Incentive
  - ERB: Employee Recognition Bonus
  - ERL: Employee Recognition Leave
  - ERN: Employee Recognition Non Mon
  - ESL: Employee Suggestion Leave
  - ESP: Employee Suggestion PMT
  - IBB: Inband Bonus
  - PBB: Project Based Bonus
  - RLP: Referral PMT
  - RNB: Retention Bonus
  - SAL: Service Award Leave
  - SOB: Sign On Bonus
  - SOL: Sign On Leave
  - SRS: Sign On/Retention Student Loan

Entering and Maintaining Rewards and Recognition



Navigation: Navigator > Workforce Development > Reward and Recognition

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Disciplinary actions are recorded for:
   a) Classified employees only.
   b) All employees

2. True or False. Performance ratings are entered every month for all employees.

3. True or False. Reward and recognition pages in Cardinal are used to track an annual bonus for all employees.

DEMO

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Lesson Summary

5

Maintain Additional HR Data (HR Level 1)

In this lesson, you learned:

- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings
- How to enter and maintain Rewards and Recognition

Lesson

6 Running Reports and Queries

This lesson covers the following topics:

- HCM Reports Catalog
- Accessing and Running a Report
- Accessing and Running a Query

HCM Reports Catalog

The Human Capital Management (HCM) Reports Catalog covers the four functional areas of Benefits (BN), Human Resources (HR), Payroll (PY), and Time & Attendance (TA). Each functional area contains queries and reports specific to that area. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.

- **Cardinal SW NAV225 Cardinal Reporting (HCM)** Web Based Training (WBT) course provides training and interactive demonstrations that cover the fundamentals of how to run or access reports and queries. This course is available in Cardinal Learning and on the Cardinal Website.

- Reports/queries may be used by more than one functional area; thus, you may need to use the search/find feature to locate a specific report/query that may be located in a different functional area.

In Cardinal:

- To run a report, the full navigation path for a specified report can be found in the HCM Reports Catalog.
- To run a query, Navigate to: **Navigator > Reporting Tools > Query > Query Viewer** and search for the query name

For further information on reports and queries in Cardinal, see the Reports Catalog titled **Cardinal HCM Reports Catalog**. The Cardinal HCM Reports Catalog is located on the Cardinal under **Resources**.

Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Lesson Summary

6 Running Reports and Queries

In this lesson, you learned:

- How to access the HCM Reports Catalog
- How to run Reports
- How to run a Query

Course Summary

HR351 HCM Cardinal Employee Data Setup and Maintenance

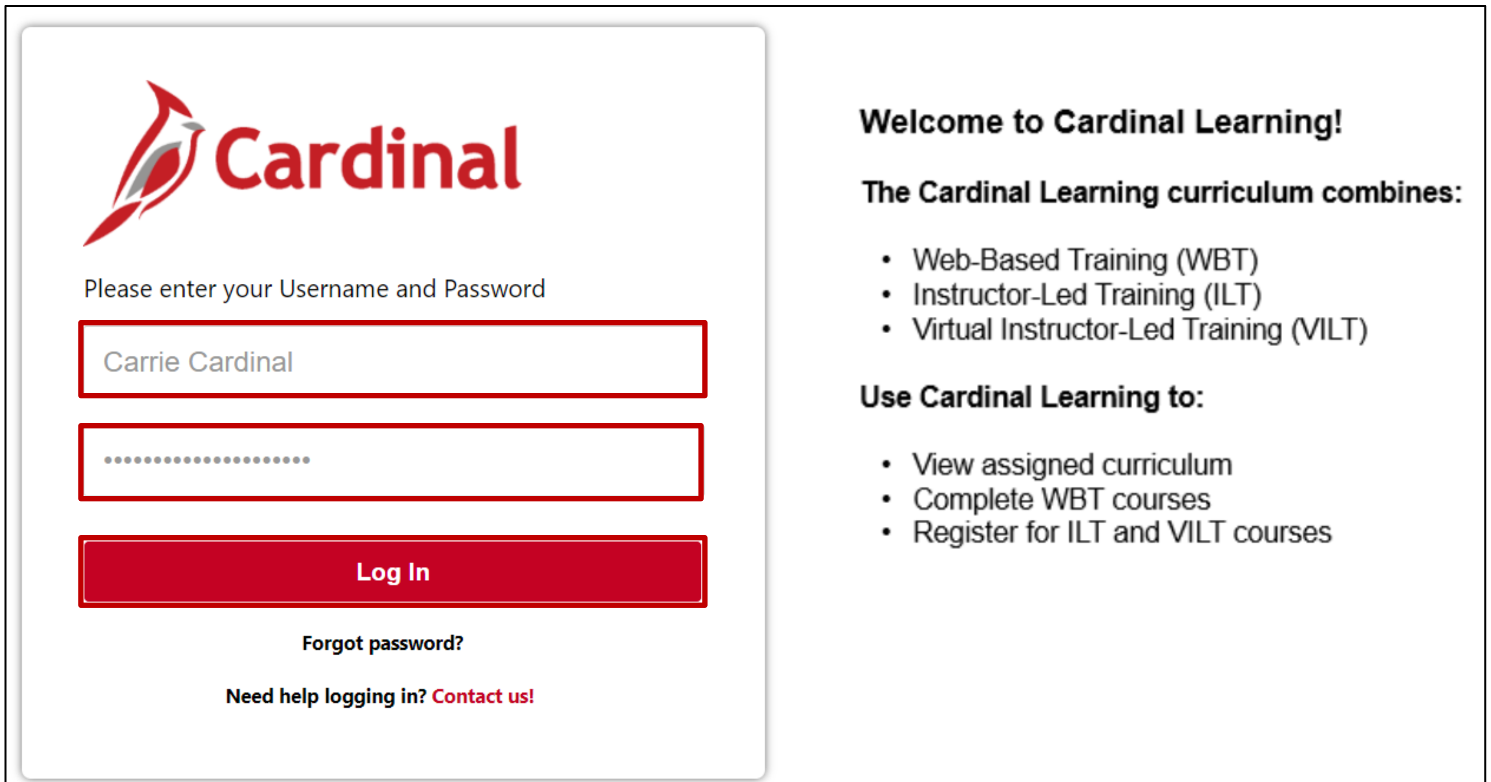
In this course, you learned:

- There is a relationship between position, job data, personal data, and job record
- How to add, clone, and maintain a position
- How to hire an employee online
- How to enter job data updates
- How to enter additional pay information
- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings
- How to enter and maintain Rewards and Recognition
- How to access the HCM Reports Catalog
- How to run Reports
- How to run a Query

How to Complete Course Evaluations

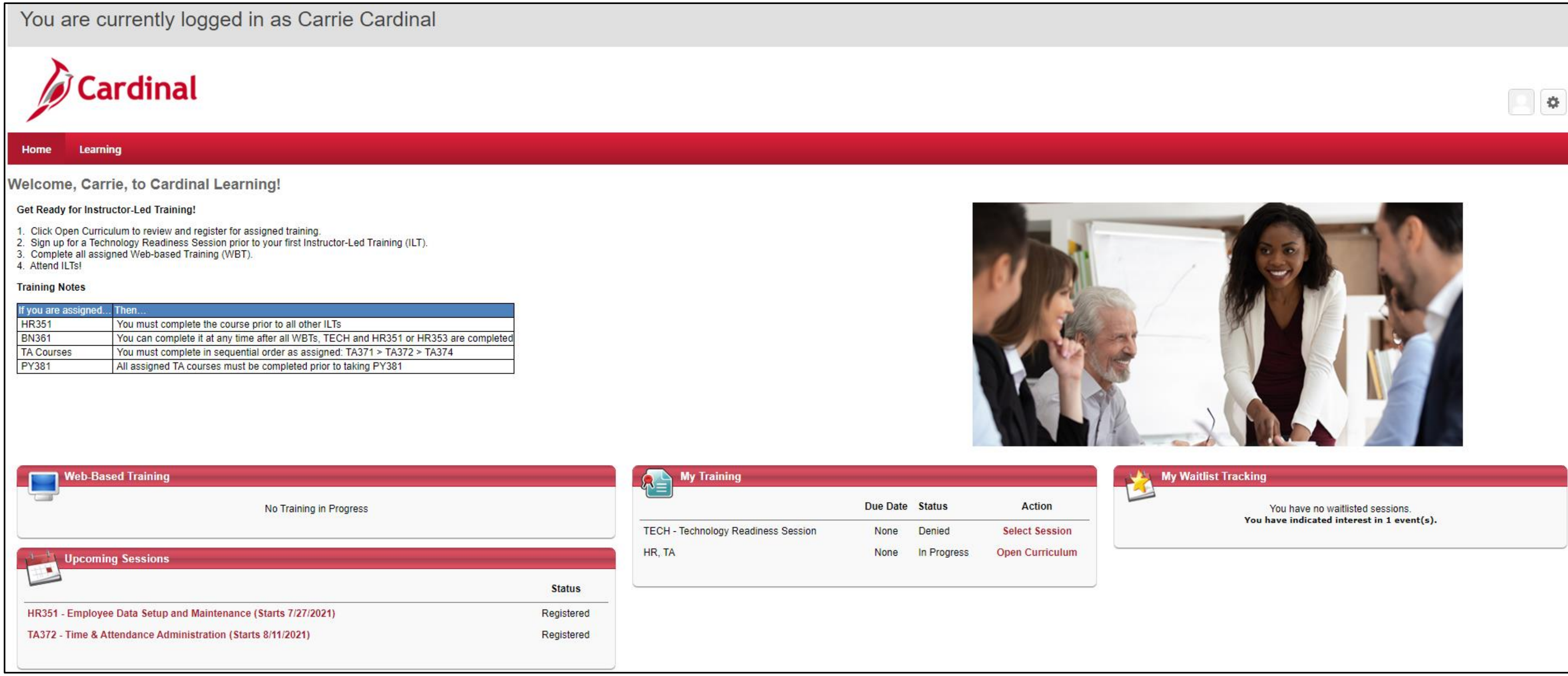
The following steps can be used to complete course evaluations at the end of an ILT or VILT training session. **Please note that it may take a couple of hours after the completion of your course for evaluations to be available**.

1. Navigate to the Cardinal Learning Homepage.
2. Enter your username in the **Username** field.
3. Enter your password in the **Password** field.
4. Click the red **Log In** button.



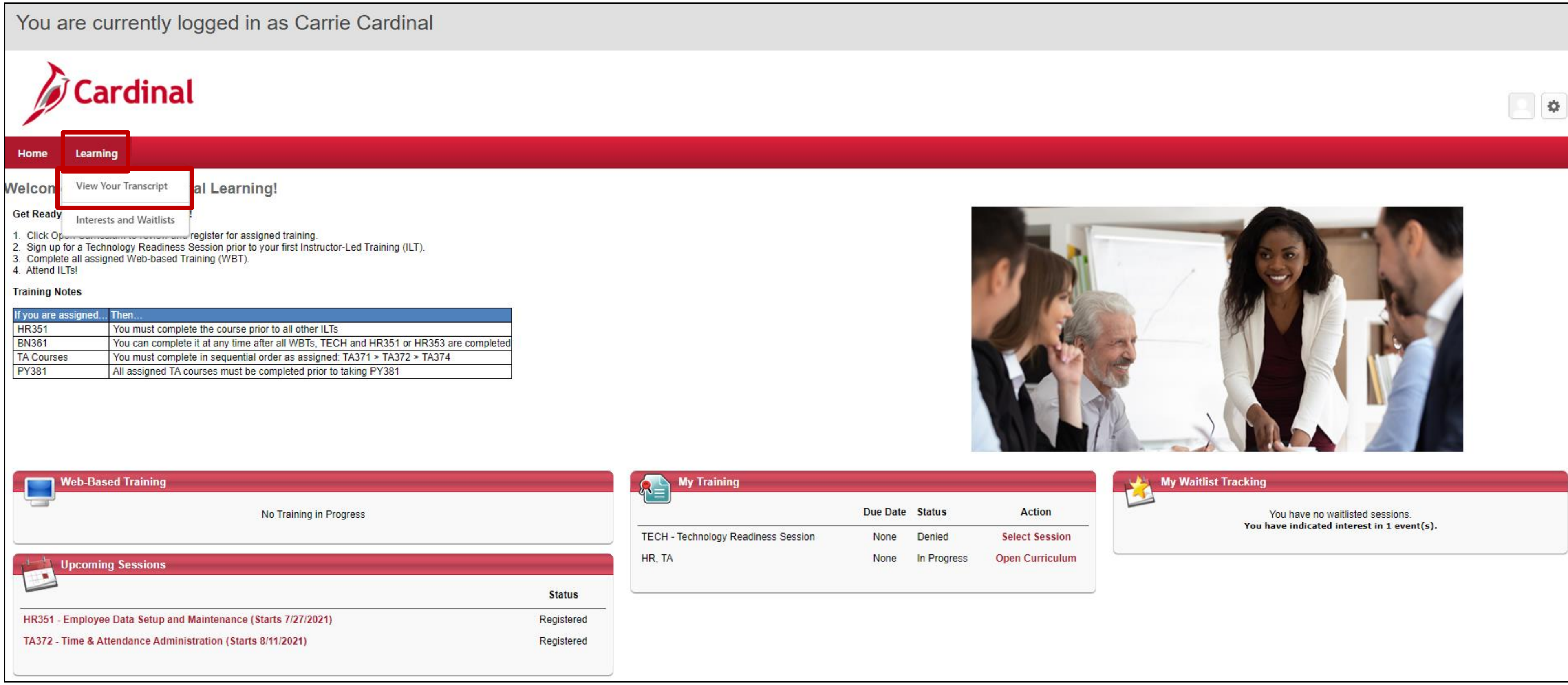
How to Complete Course Evaluations (Continued)

5. The **Cardinal Learning Homepage** displays.



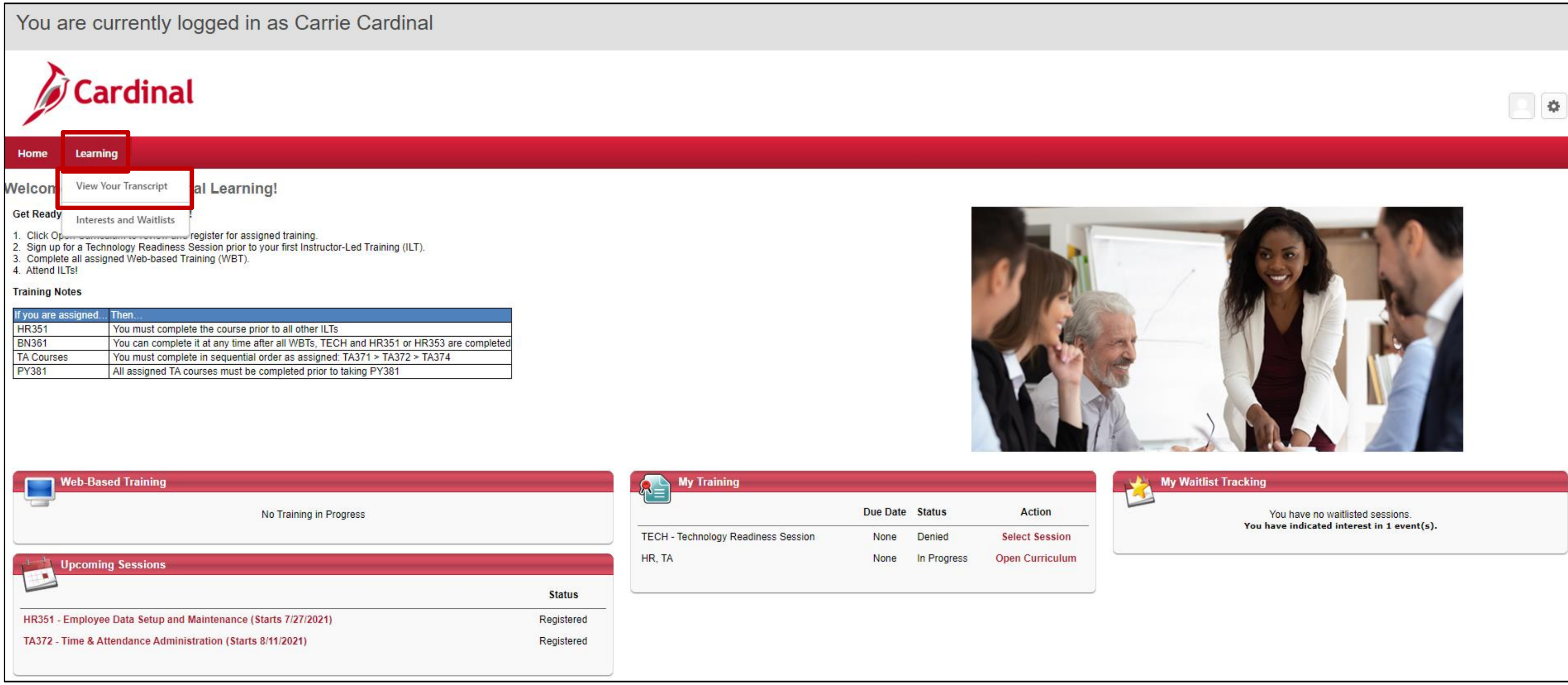
How to Complete Course Evaluations (Continued)

6. Hover over the **Learning** tab in the **Global Navigation** bar.
7. In the displayed dropdown menu, click **View Your Transcript**.



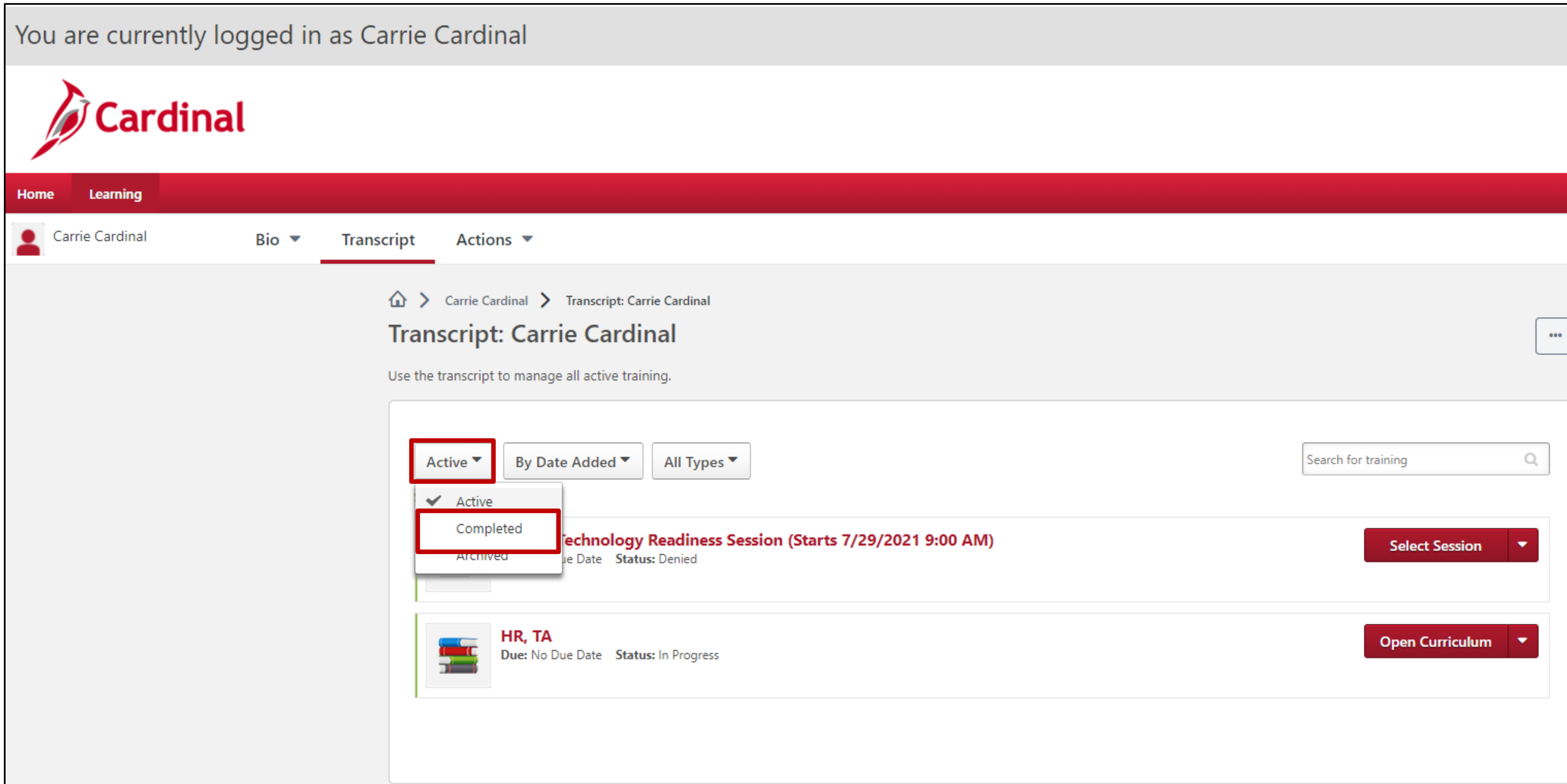
How to Complete Course Evaluations (Continued)

6. Hover over the **Learning** tab in the **Global Navigation** bar.
7. In the displayed dropdown menu, click **View Your Transcript**.



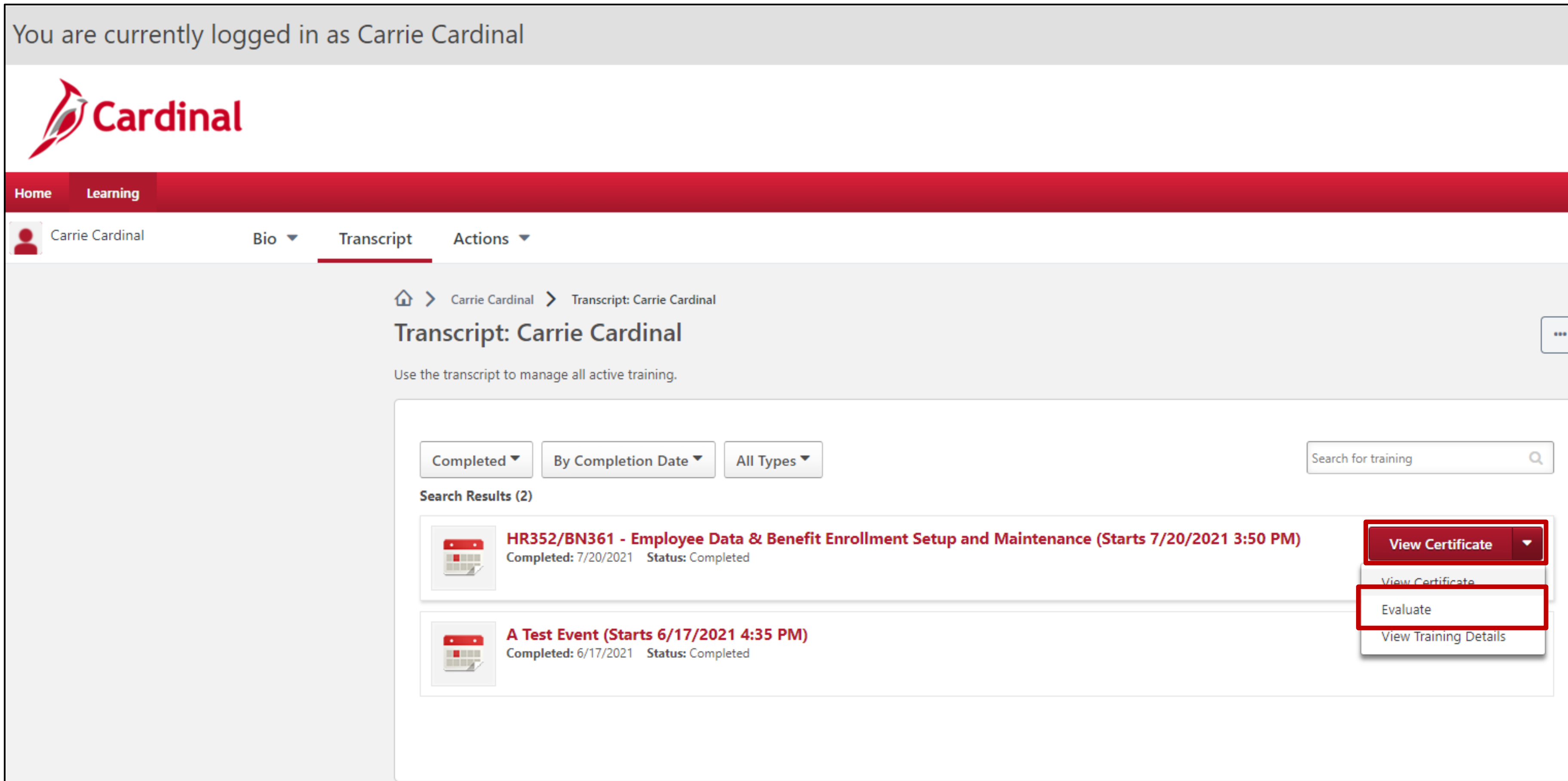
How to Complete Course Evaluations (Continued)

8. Your **Transcript** page displays.
9. Hover over the **Active** tab.
10. In the displayed dropdown, click **Completed.**



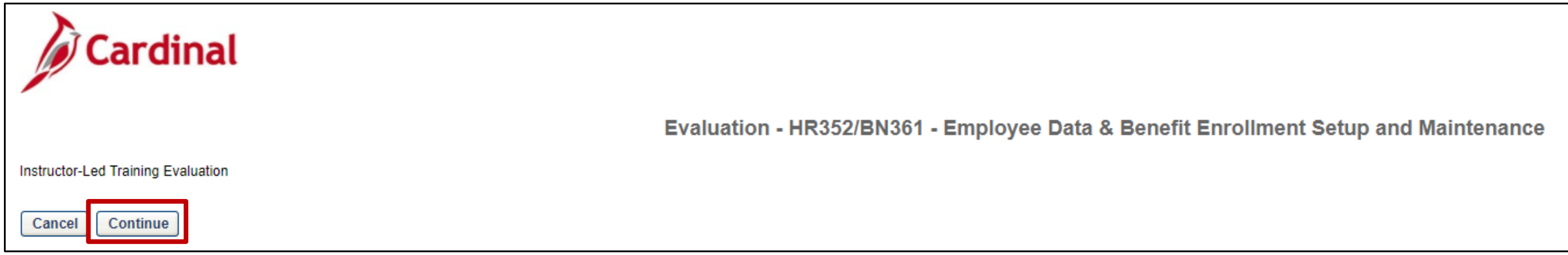
How to Complete Course Evaluations (Continued)

11. Your **Transcript** page refreshes.
12. Hover over the **View Certificate** button for the completed course.
13. In the displayed dropdown, click **Evaluate.**

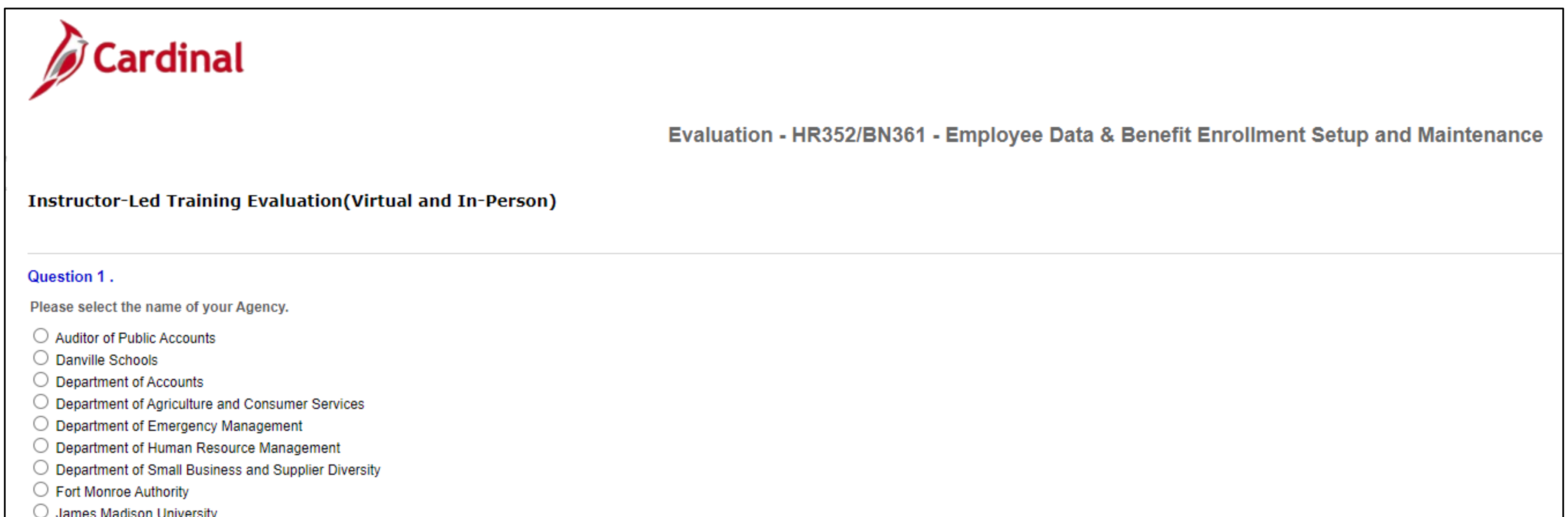


How to Complete Course Evaluations (Continued)

14. A course evaluation notification displays.
15. Click **Continue.**



16. The course evaluation displays.
17. Complete and submit the course evaluation.



Appendix

Employee Transfer Scenarios between Release 2 and Release 3

How to enter a VCCC ticket

Process Flowchart Key

Process Flows

Employee Transfers

Transfer Employees to/from R2 Agency

Scenario 1: Employee is currently in R1 Agency (via Conversion), transferring to R2 Agency (with PMIS record):

- R1 Agency will terminate the employee in Cardinal – TER/XFO
- R2 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002
- R2 Agency will review personnel file and if R1 PMIS transactions are missing (>Mid March) that impact record, submit DHRM iHelp request to add
- R2 Agency will work with OHB to amend the Benefits record in BES

Scenario 2: Employee currently in R1 Agency, whose original hire was after R1 go-live, is transferring to an R2 Agency (only EmplID created in PMIS):

- R1 Agency will terminate the employee in Cardinal
- R2 Agency will pull the employee in using PES001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002
- R2 Agency will need to create the BES record, if applicable

Transfer Employees to/from R2 Agency

Scenario 3: Employee currently in R2 Agency with a PMIS record, but No Cardinal Record, is transferring to an R1 agency (Between R1 – R2, PMIS nightly interface is loading Empl ID and SSN to Cardinal):

- R2 agency will terminate the employee in PMIS
- R1 Agency will retrieve the existing EmplID in Cardinal using Employee Search Match
- R1 Agency will hire the employee in Cardinal including personal data as well as position/job data

Scenario 4: Employee transfers from R2 to R1 agency then transfers back to the R2 prior to R2 Go-Live:

- R2 agency will terminate employee in PMIS
- R1 Agency will retrieve the existing EmplID in Cardinal using Employee Search Match
- R1 Agency will hire the employee in Cardinal including personal data as well as position/job data

When processing transfer back to R2 agency:

- R1 agency will use the TER/XFO Action/Action reason to terminate employee in Cardinal
- R2 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002
- Employee transfers from R1 to R2 agency then transfers back to R1

Transfer Employees to/from R2 Agency

Scenario 5: Employee transfers from R1 to R2 agency then transfers to a different R1 agency prior to R2 Go-Live:

- R1 agency will terminate employee in Cardinal using the TER/XFO Action/Action Reason
- R2 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002

When processing transfer into the different R1 agency:

- R2 agency will terminate the employee in PMIS
- R1 Will use the HIR Action and applicable XF_ to Transfer the employee into empl record 0

Scenario 6: Employee transfers from R1 to R2 agency then transfers back to **same** R1 agency prior to R2 Go-Live:

- R1 agency will terminate employee in Cardinal using the TER/XFO Action/Action Reason
- R2 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002

When processing transfer back to R1 agency:

- R2 agency will terminate the employee in PMIS
- R1 Will use the REH Action to Transfer the employee back into the same empl record

Opening a Cardinal Help Desk Ticket

The Cardinal Post Production Support (PPS) team is always available to help if you encounter an issue that cannot be resolved at your agency/locality or by using training materials.

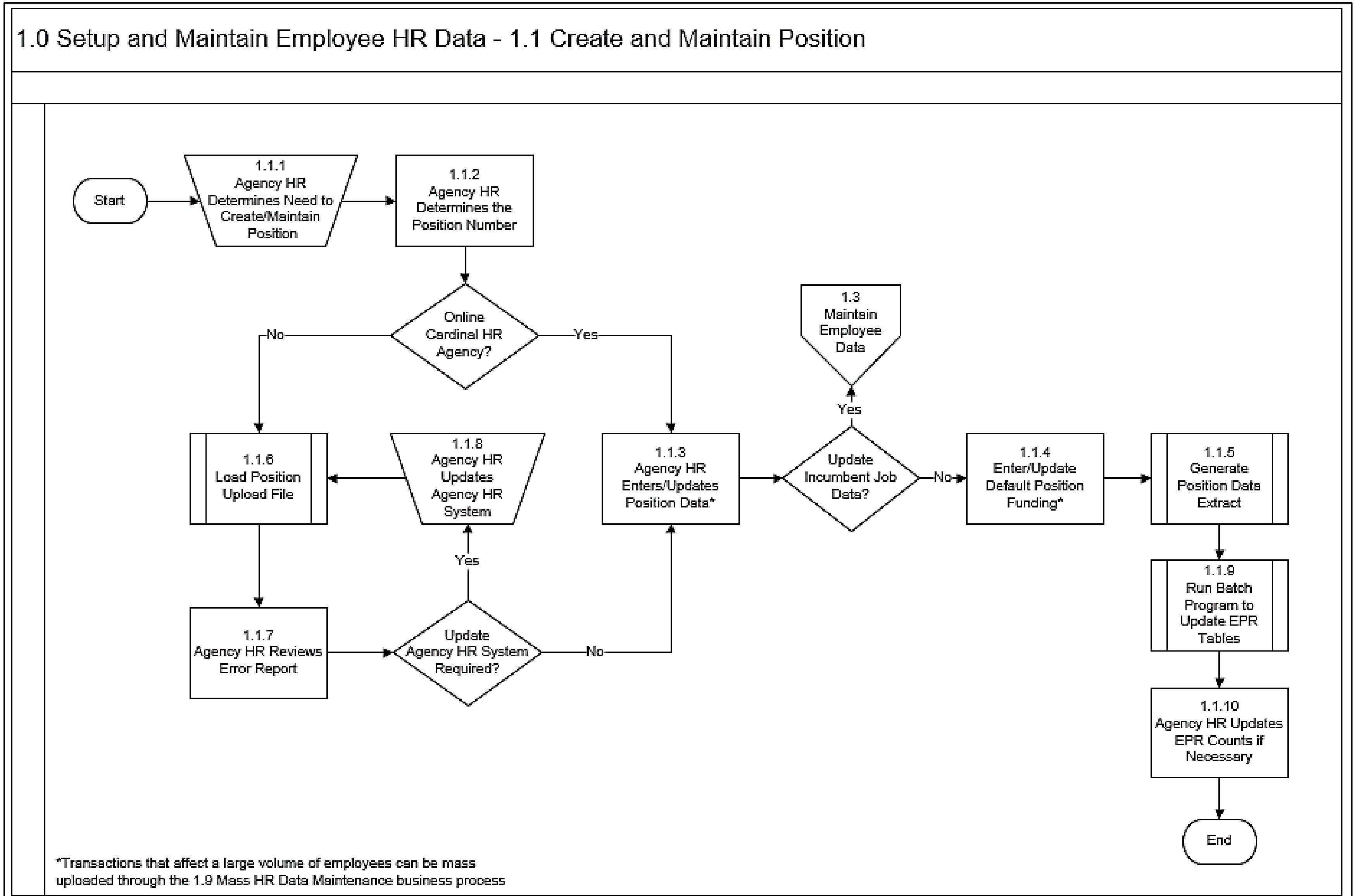
When opening a Cardinal Help Desk ticket through the VCCC, here are some tips that will help resolve your issue faster:

- Use “CARDINAL” in the subject line
- Be sure to include your contact information including an email address and <u>phone number at which you can be reached</u>
- Details, details, details! Information such as the module you’re using (HR, Payroll, Benefits, etc.), the screen/tab you are looking at, the actions you are attempting to perform, and any error messages are all important
- Sending screenshots? Attaching screenshots is a great way for the PPS team to see what is happening. However, DO NOT include personal information on those screenshots. Make sure sensitive data is blurred out or cropped out
- DO NOT send “encrypted” emails (i.e., Virtu) to VCCC for ticket creation. You should not include protected personal information (SSN, Birthdate, address) when you submit a ticket. When this type of information is required in order for the issue to be resolved, please send a separate email to the respective Cardinal PPS Team email account using Virtu so that the PPS Team member who works on the issue can open the protected email

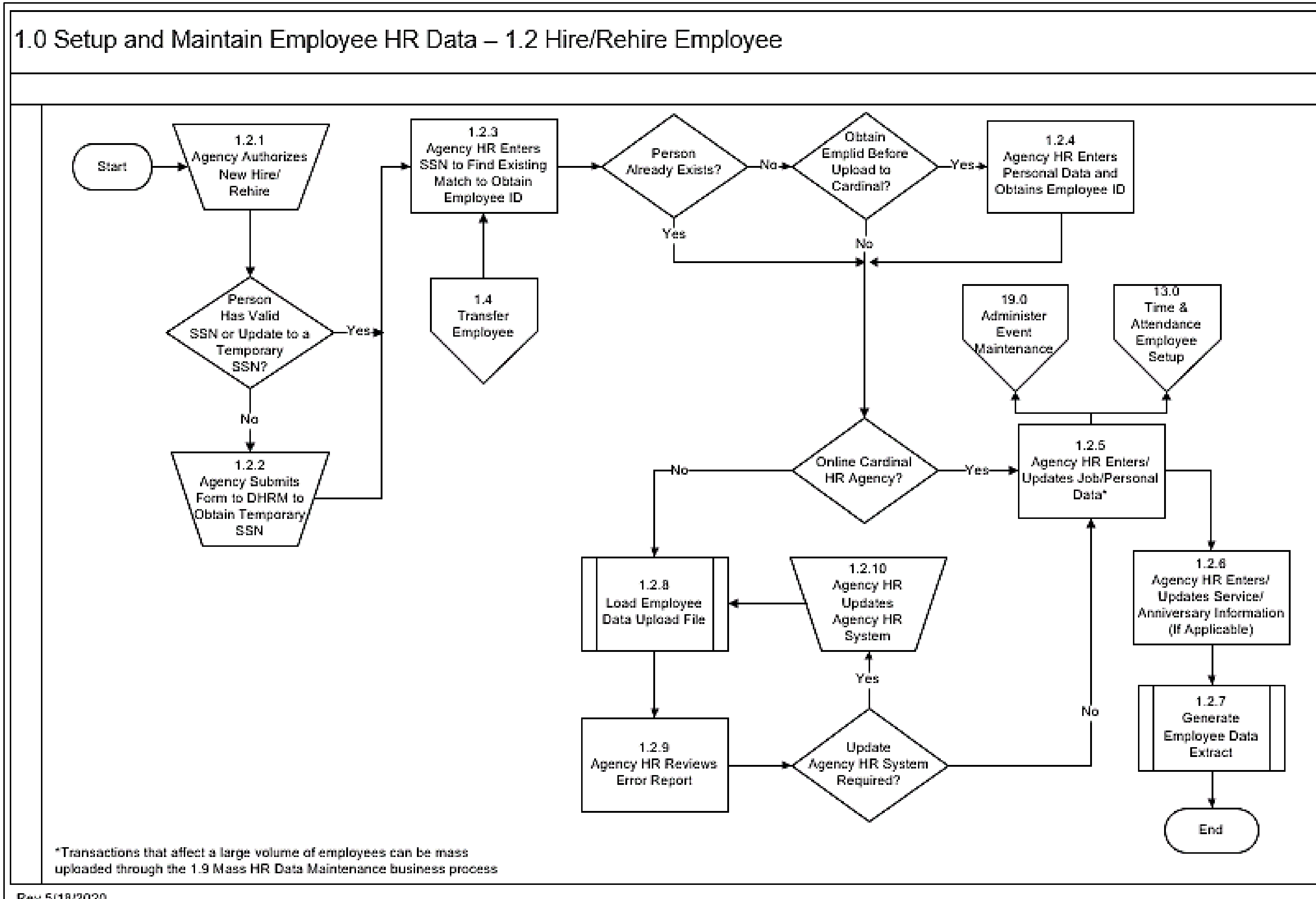
Flowchart Key

Step Description	Depicts a process step or interface.	Start	Indicates point at which the process begins. Does not represent any activity.
Batch Process	Specifies a batch process.	End	Indicates point at which the process ends. Does not represent any activity.
Manual Operation	Depicts a process step that is preformed manually.	Document	Depicts a document of any kind, either electronic or hard copy.
Decision Outcome	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.	X	Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
Entity Name	Represents an entity (person, organization, etc.).	Step/ Process	Connects steps between business processes.

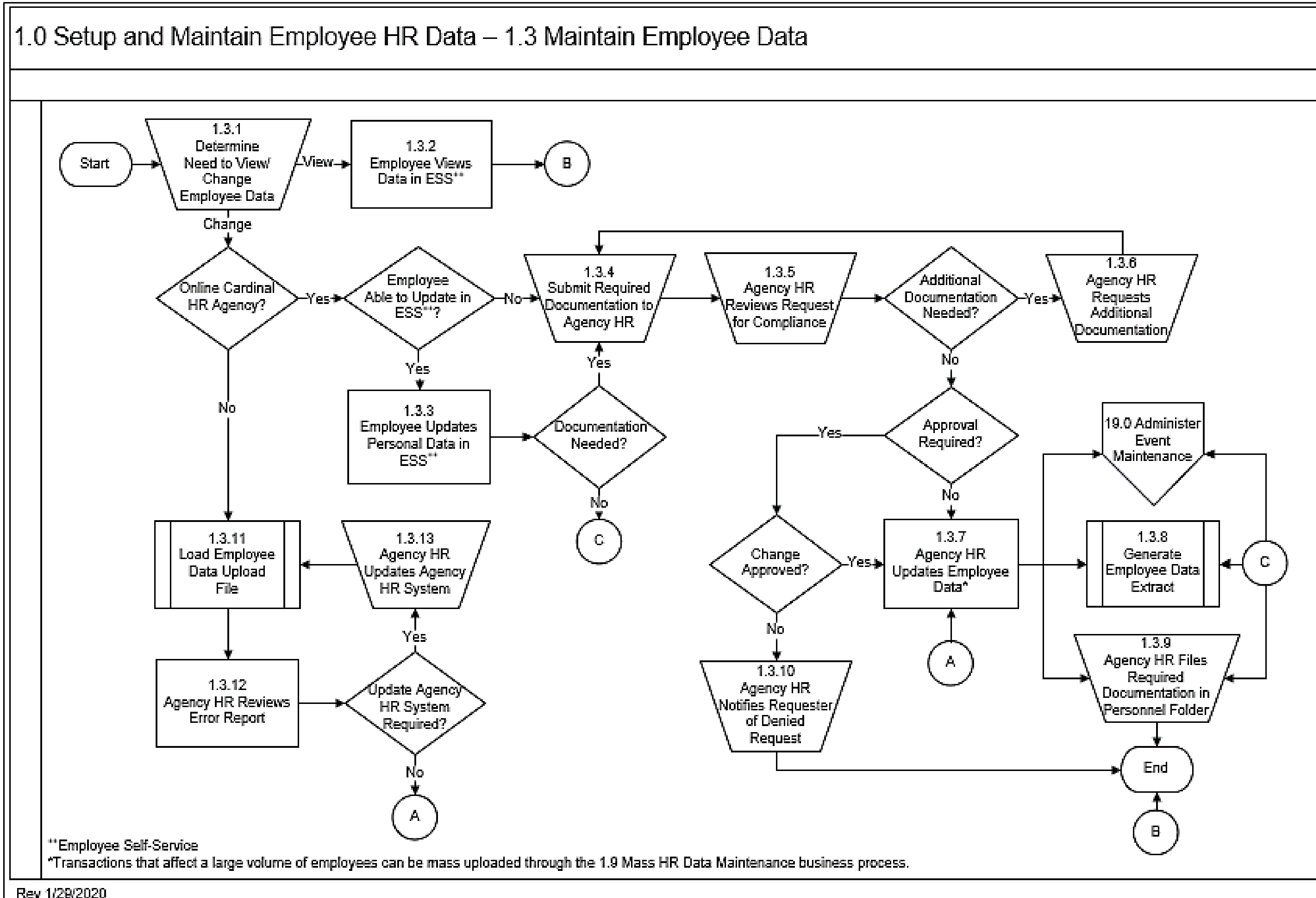
Creating and Maintaining Position Data



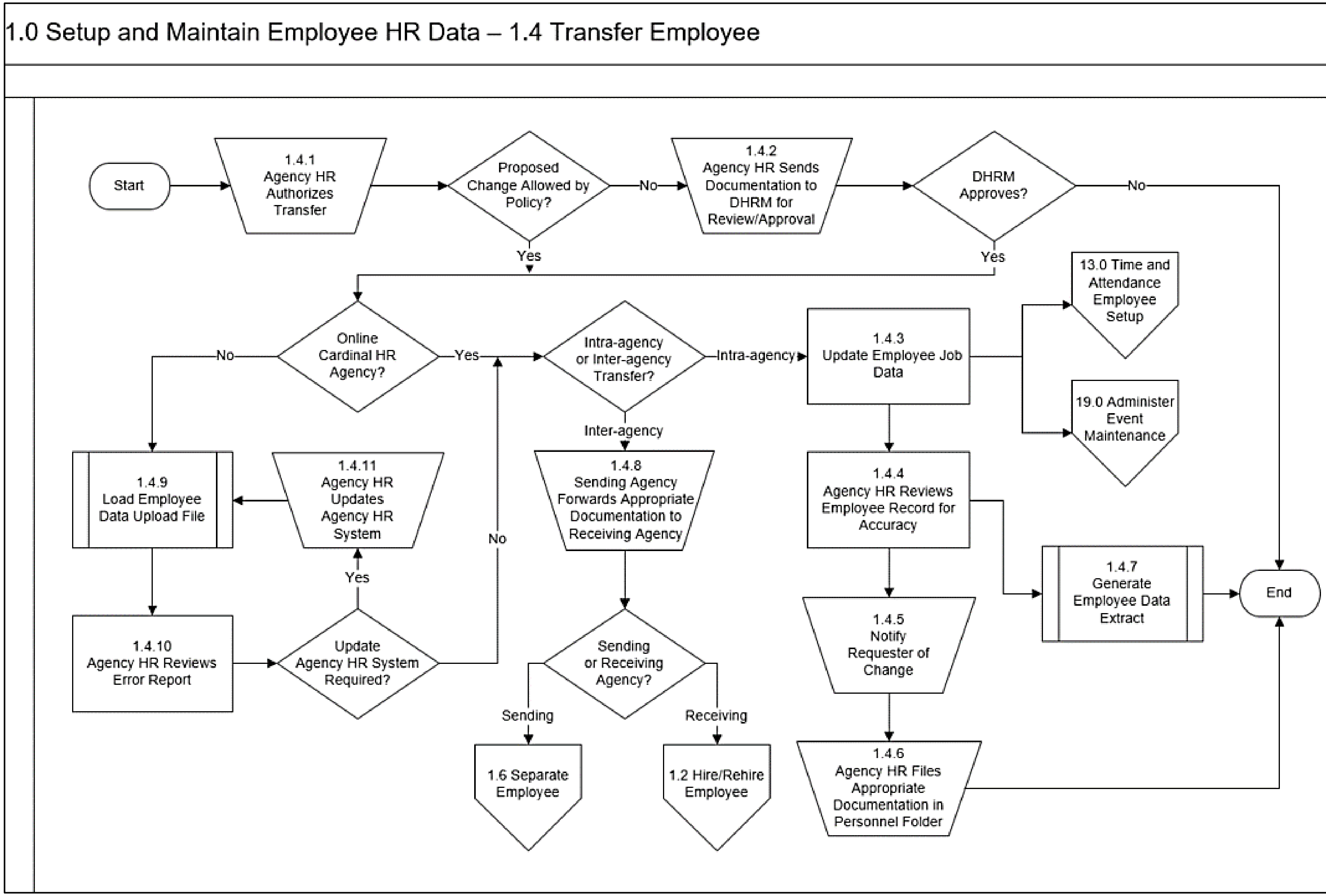
Hiring or Rehiring an Employee



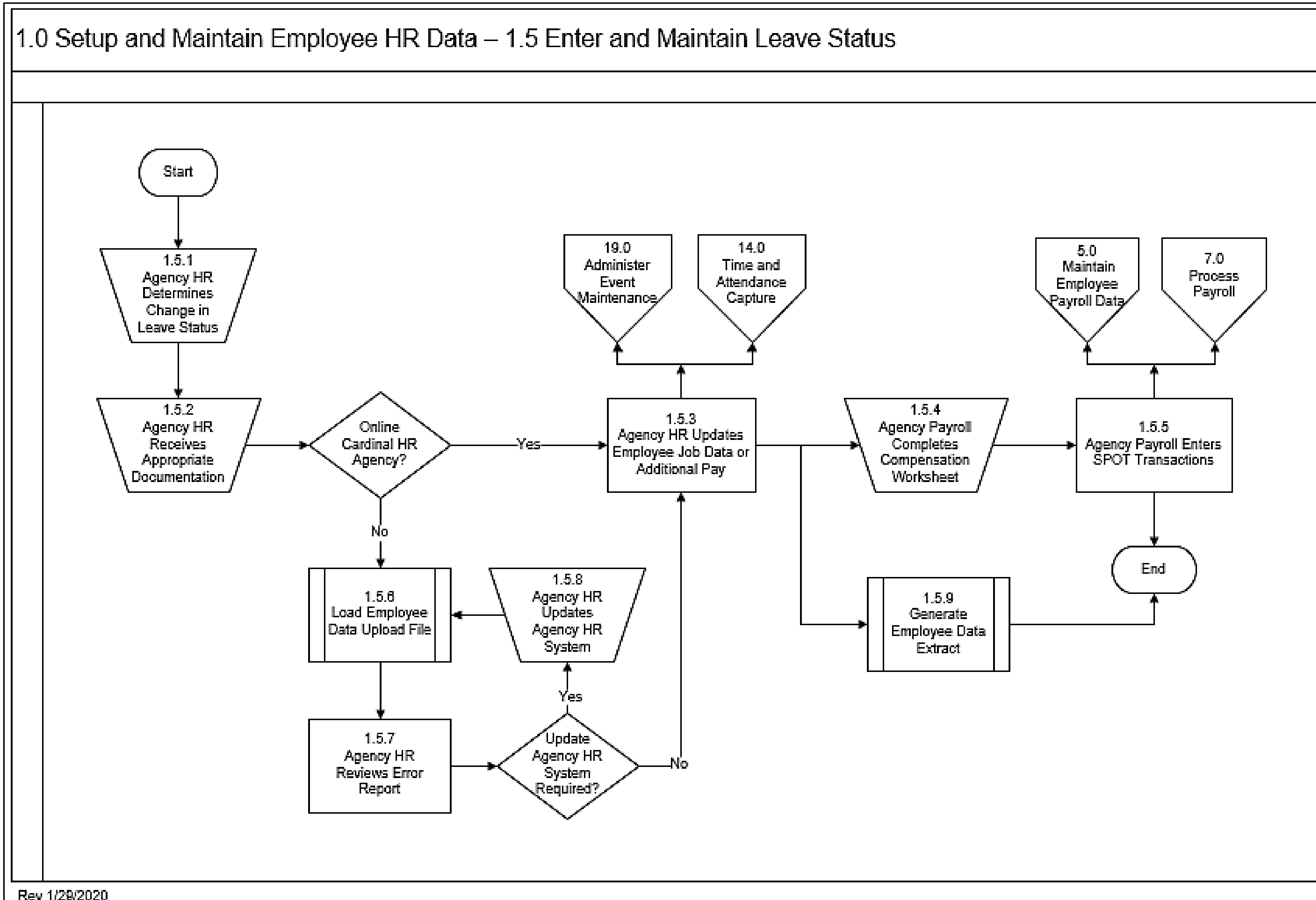
Maintaining Employee Data



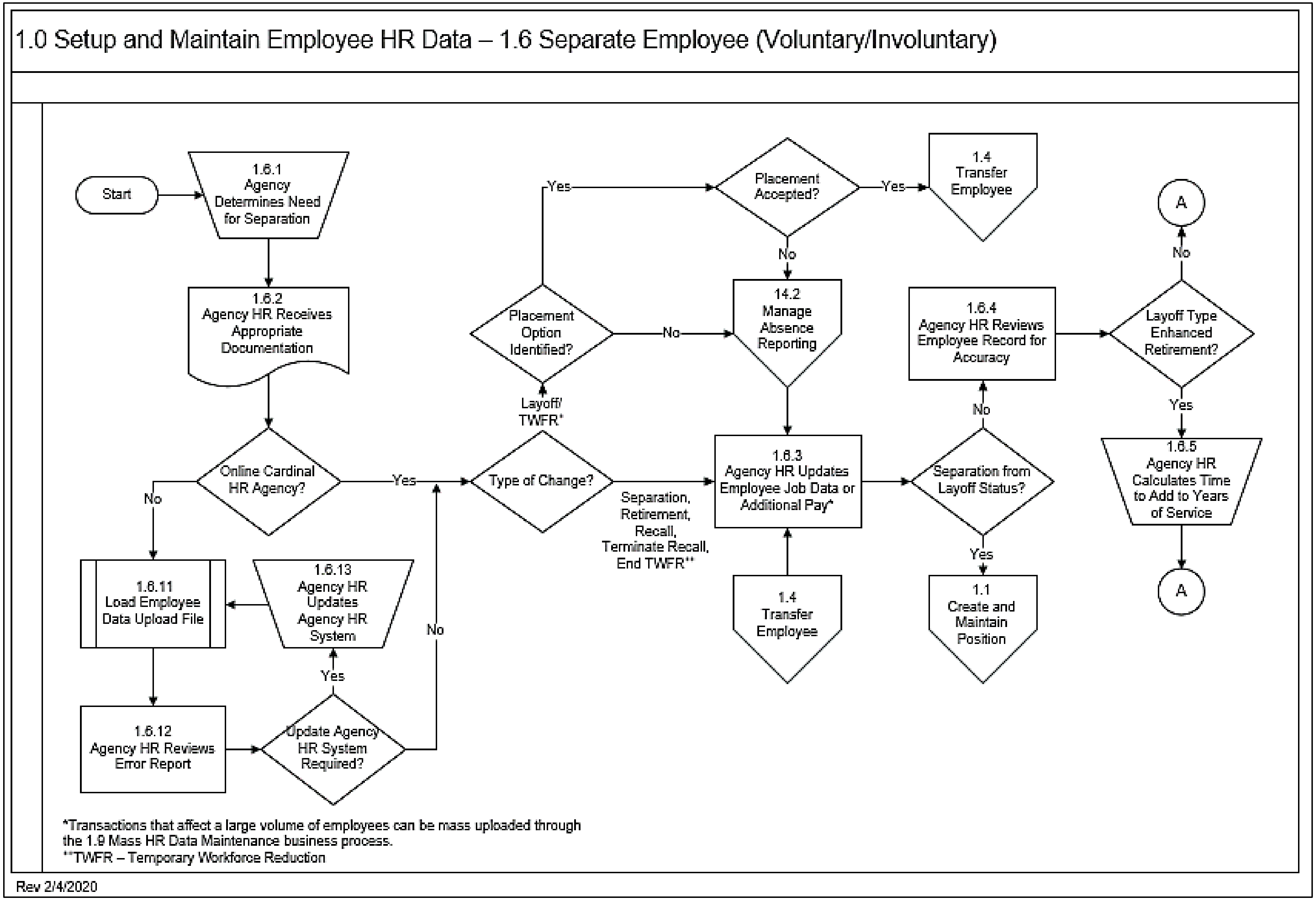
Employee Transfer



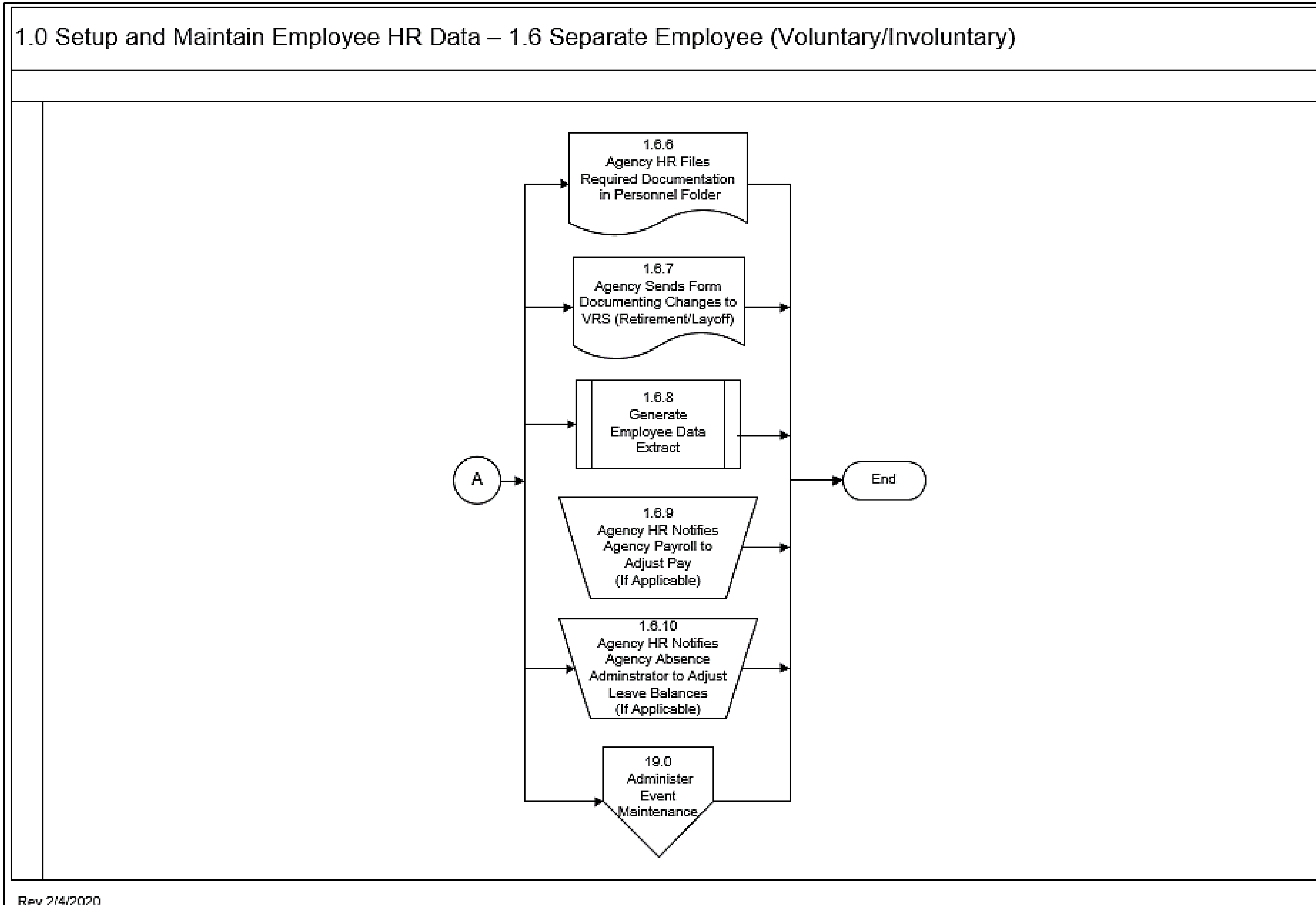
Maintain Leave Status



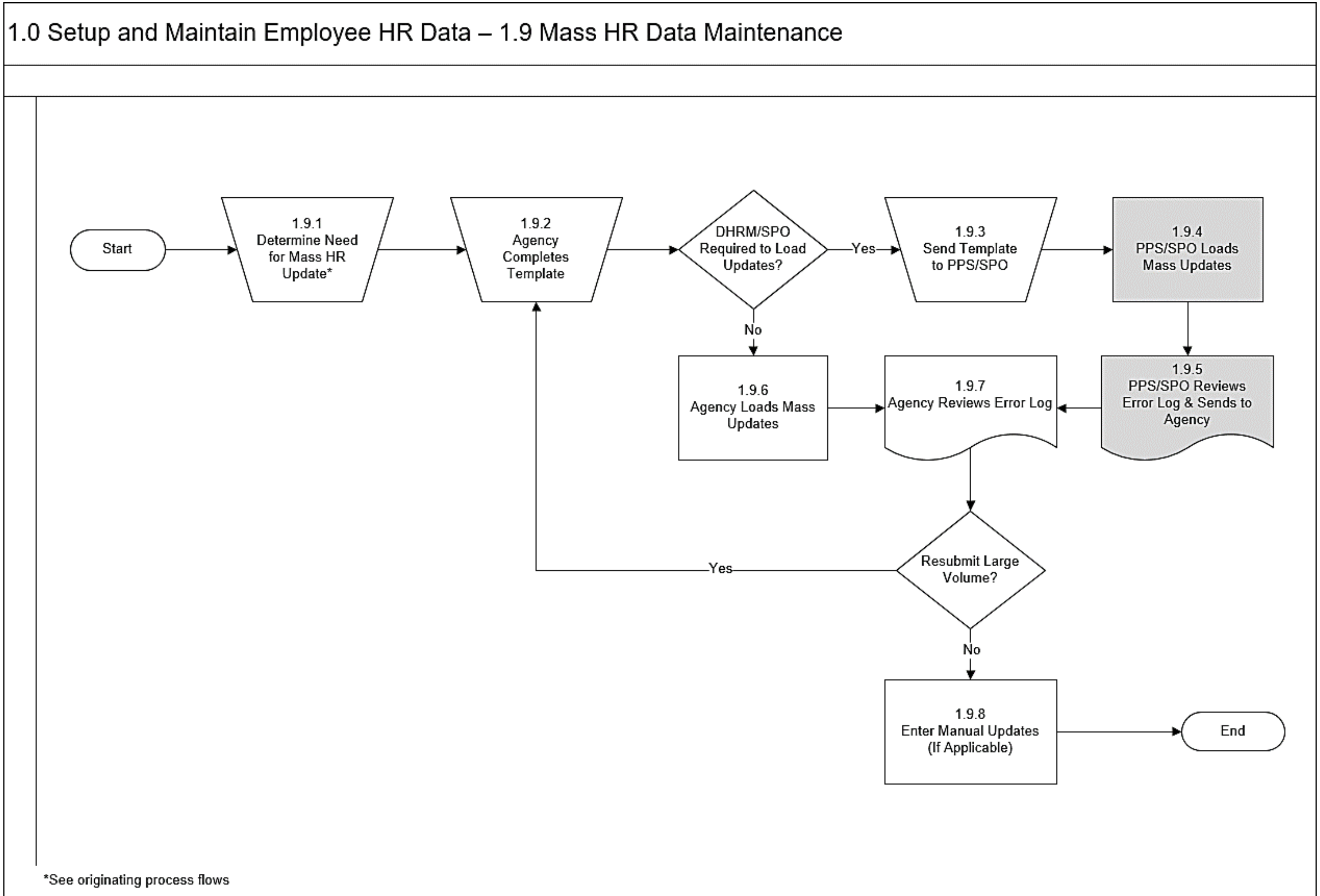
Separate Employee



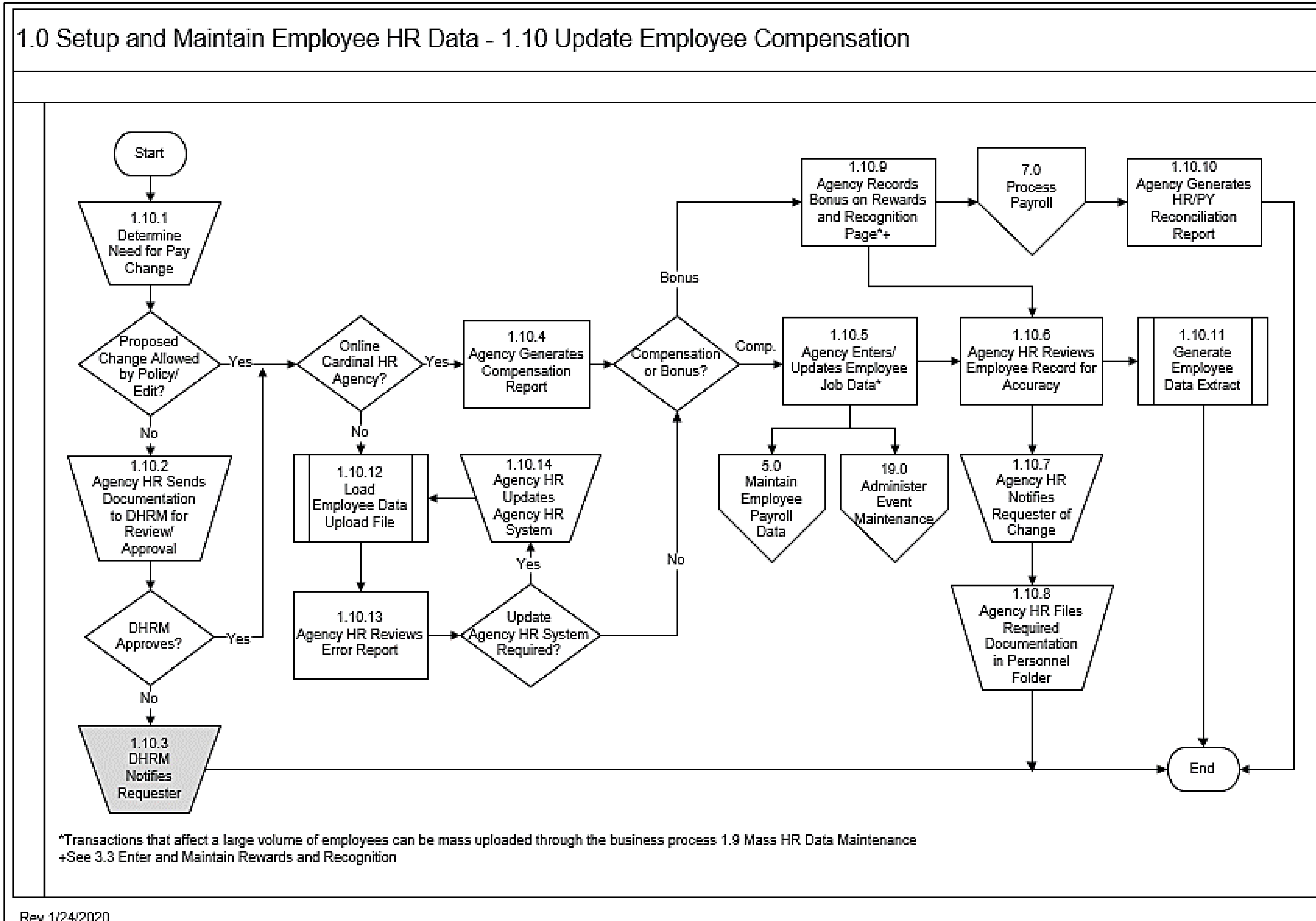
Separate Employee



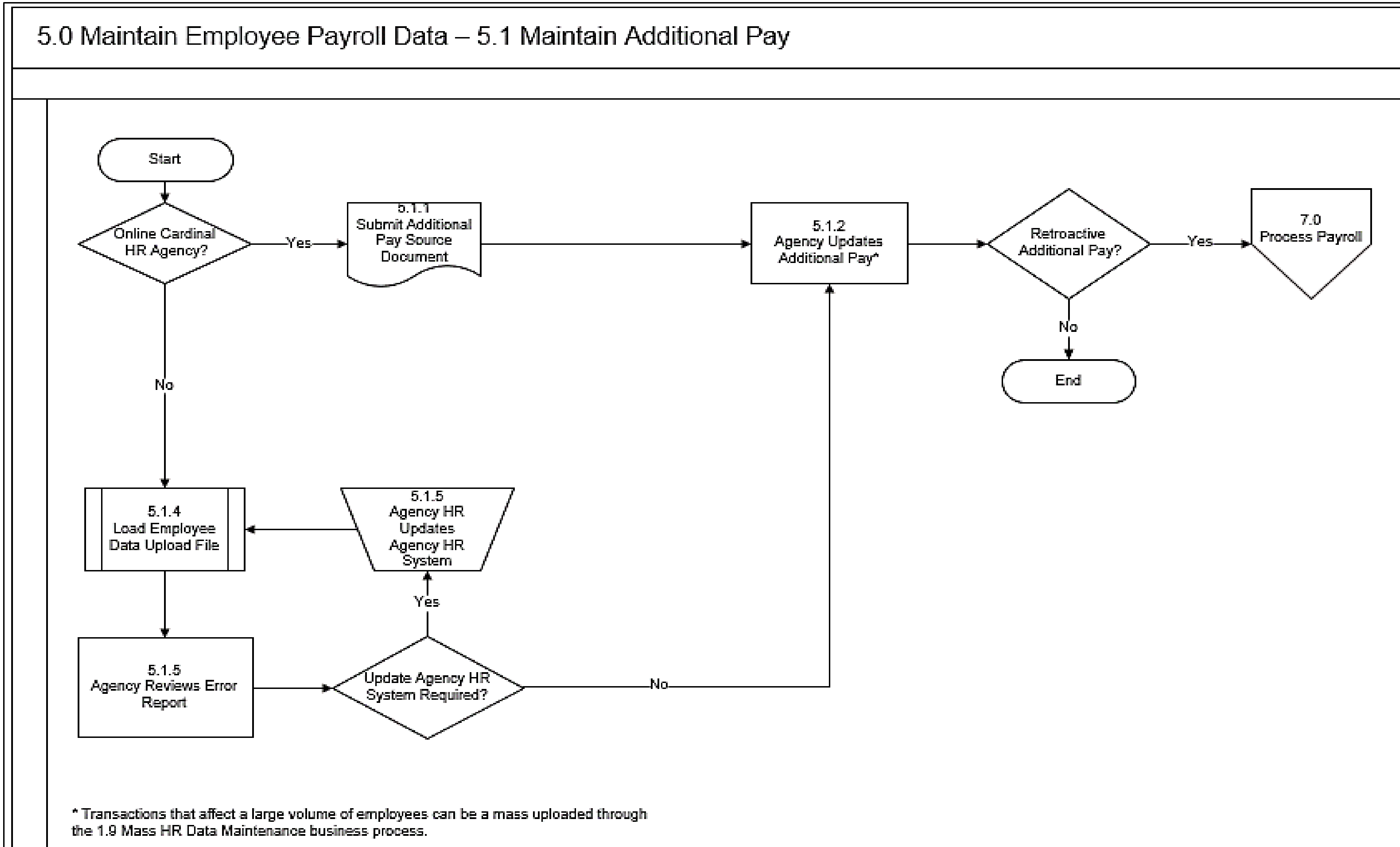
Mass HR Data Maintenance



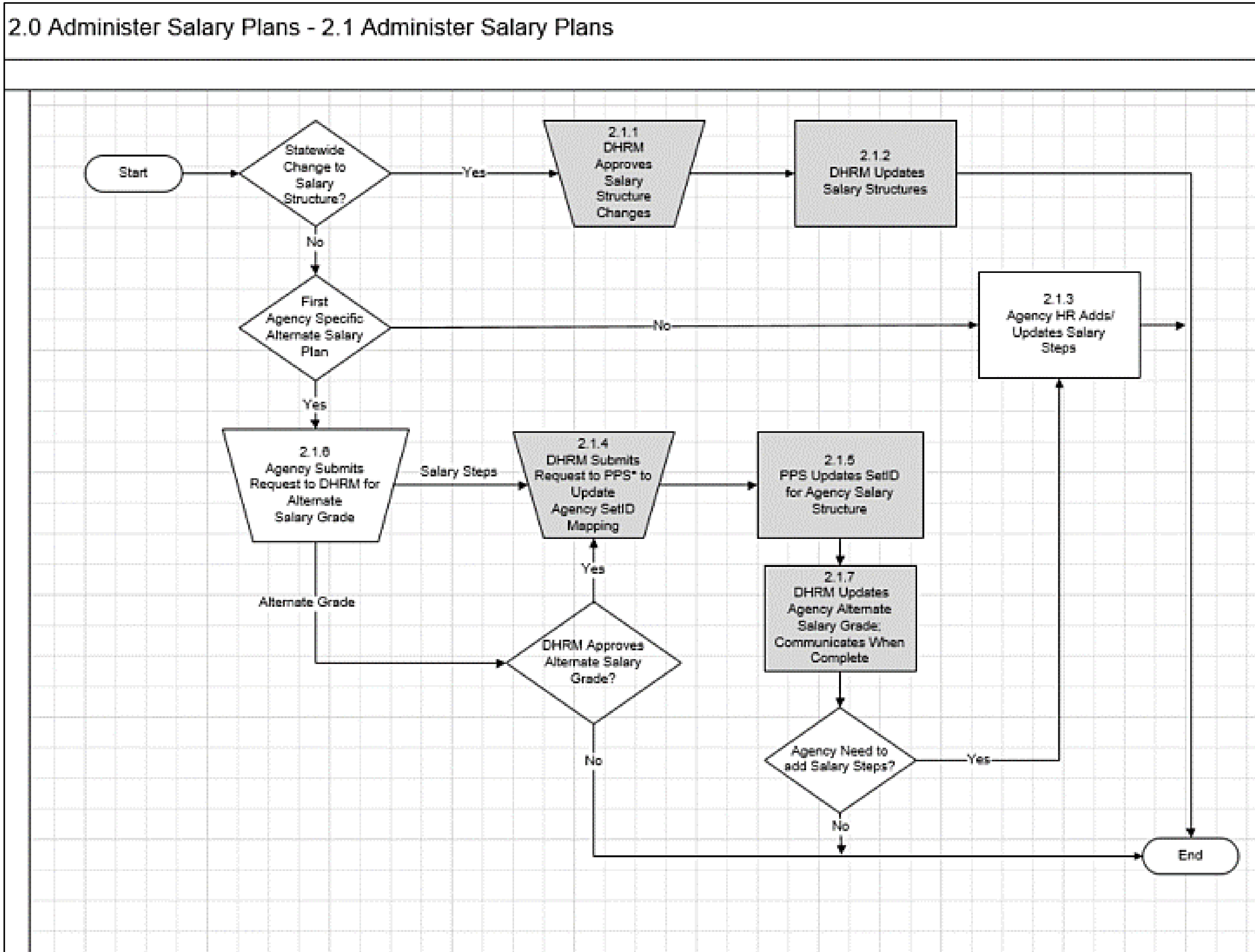
Updating Employee Compensation



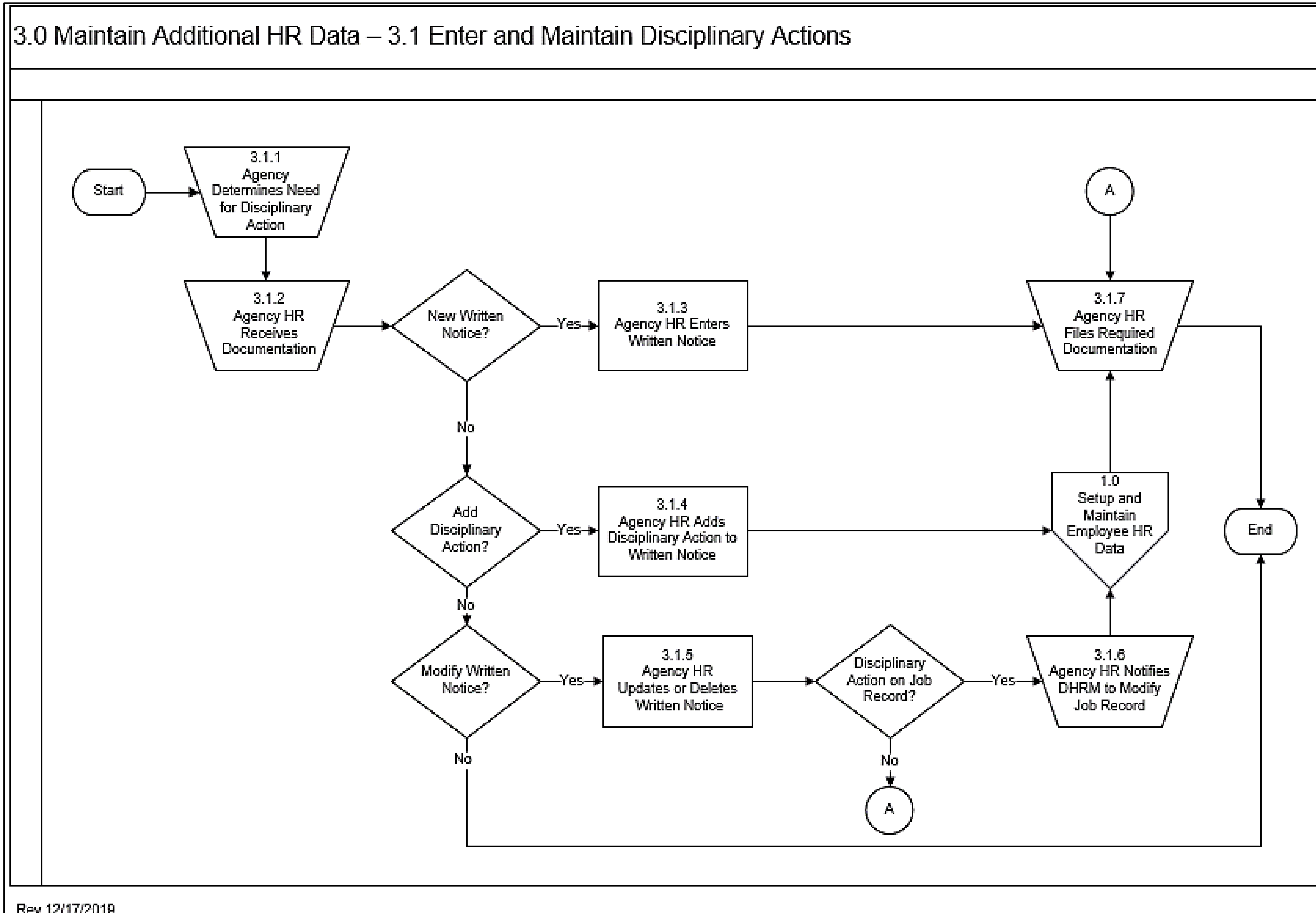
Maintaining Employee Additional Pay



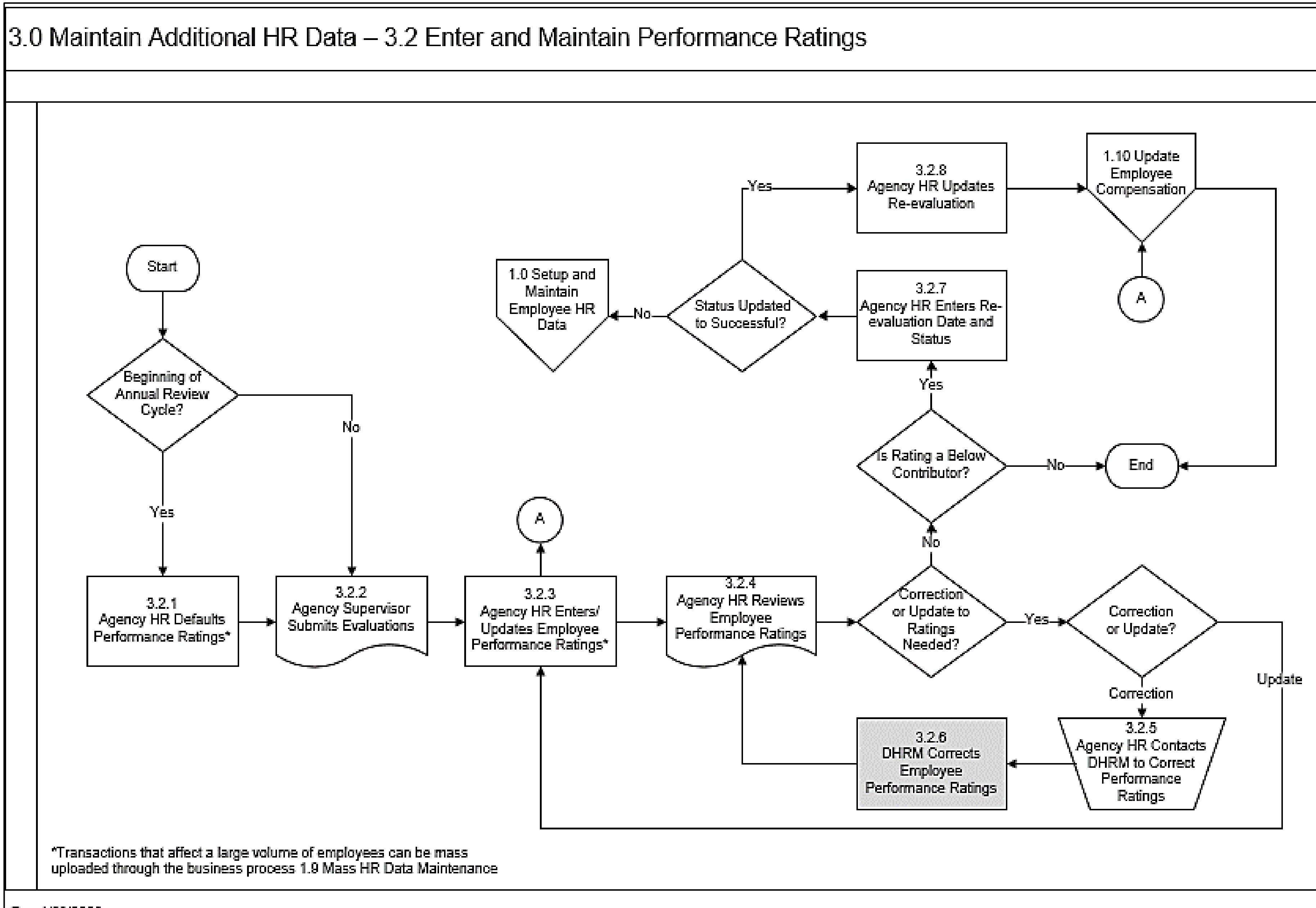
Administering Salary Plans/Grades/Steps



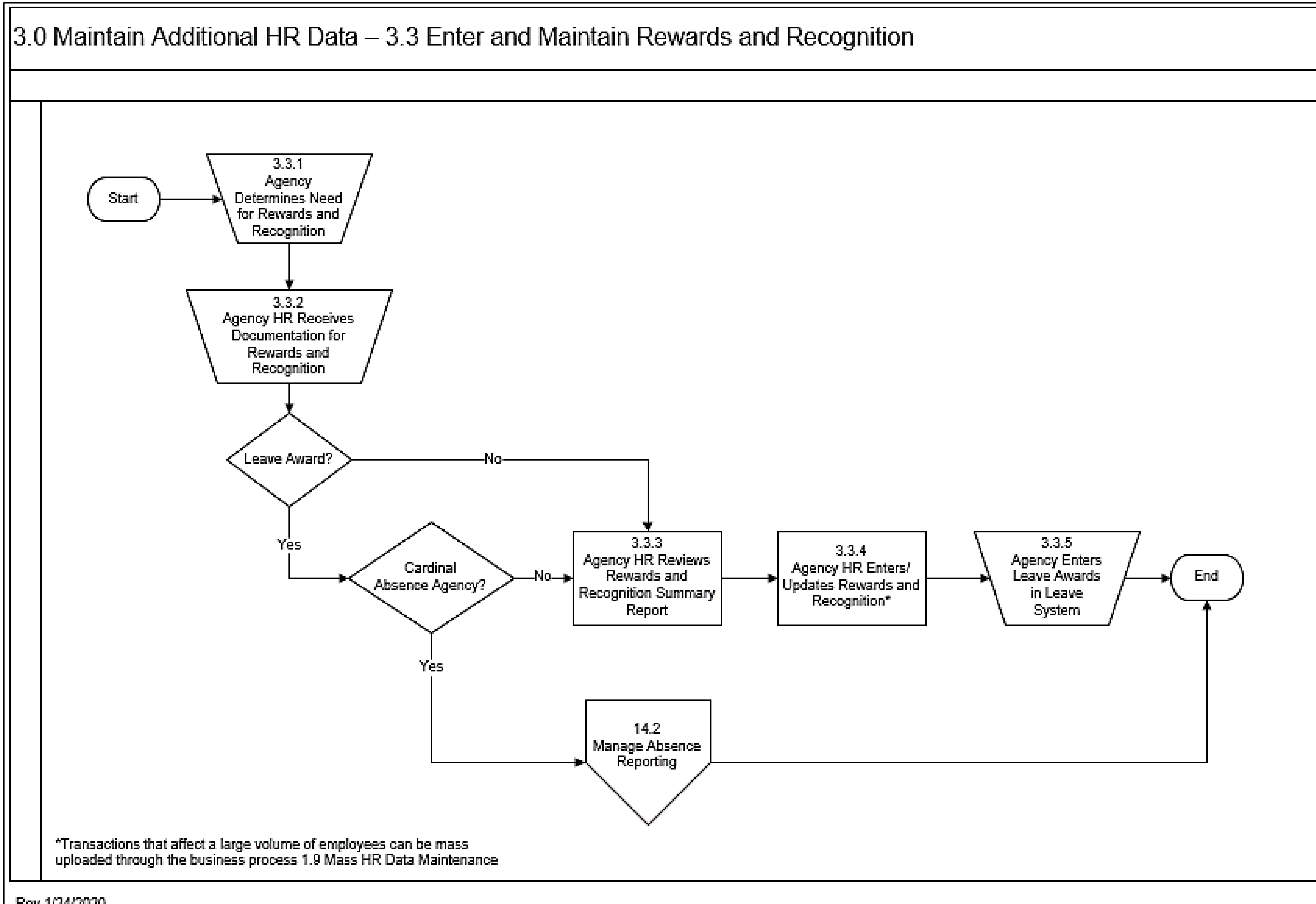
Entering and Maintaining Disciplinary Actions



Entering and Maintaining Performance Rating



Entering and Maintaining Rewards and Recognition



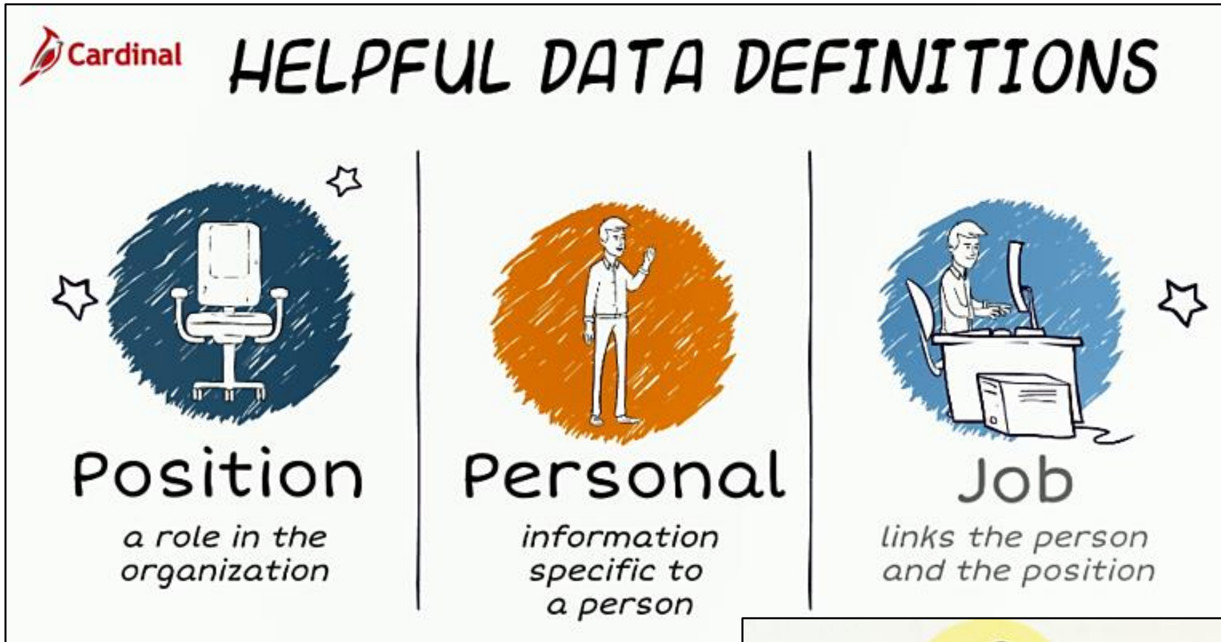
Cardinal HR Levels

The Cardinal HR Level drives the HR data that is required in Cardinal HCM.

Cardinal HR Levels						
HR Level	**Position Data Required**	**Job Data Required**	**Salary/Rate Data Required**	**Performance Evaluation Data Required**	**Disciplinary Action Data Required**	**Rewards/ Recognition Data Required**
Level 1 – Full HR	Full	Full	Full	Yes	Yes	Yes
Level 2 – Medium HR	Full	Full	Full	No	No	No
Level 3 – Basic HR	Default/Dummy Position Information Only	Basic	No	No	No	No
Level 4 – Employee Position Report (EPR) Only	None	None	None	No	No	No

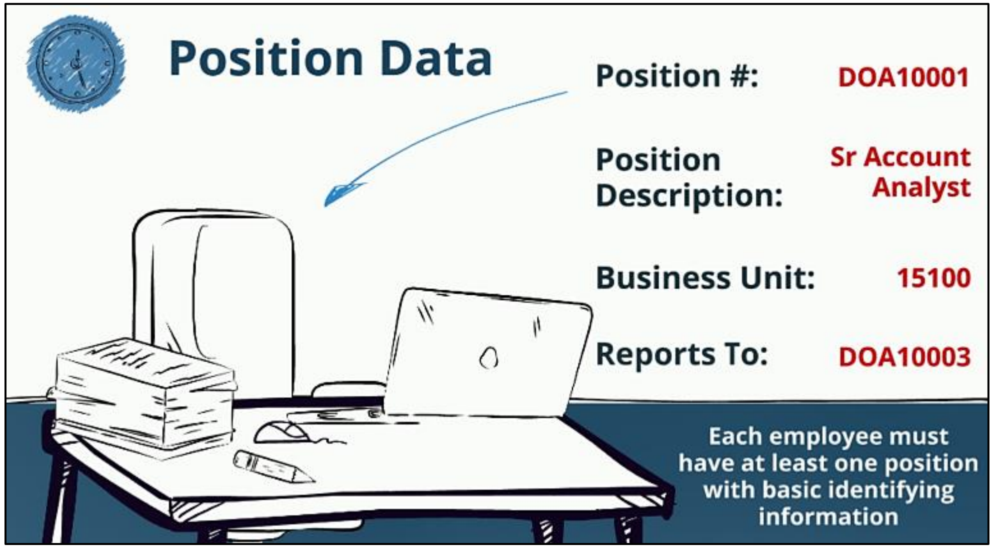
Note: Not all Agencies use all of the Cardinal HCM functional areas.

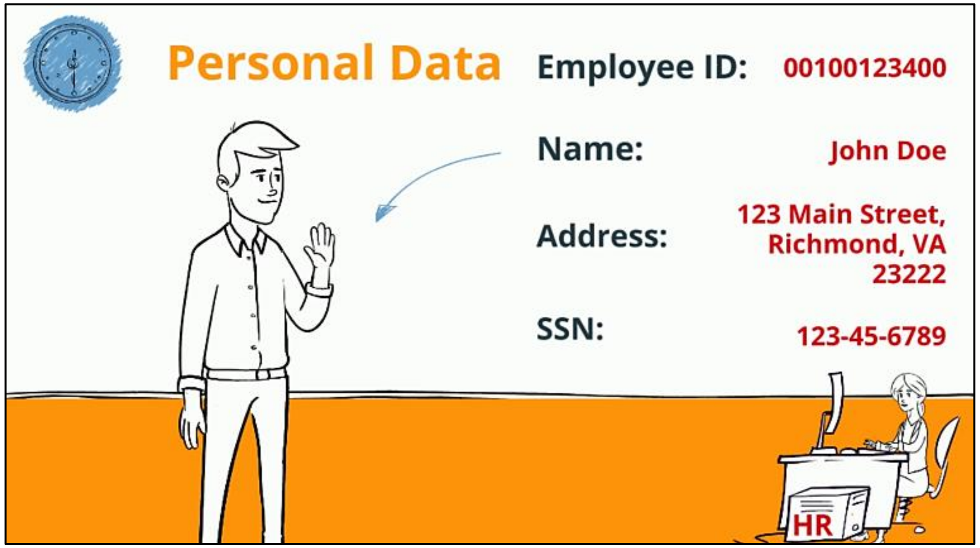
HR Data Relationships Review



Hiring or Rehiring an Employee (continued)

When the hire process is complete the entire employee record is added into Cardinal.





HR Data Relationships Review